Direct Data Entry

User Manual

Rev 4. – 05/23/2007

The Ohio Department of Aging
50 W. Broad Street, 9th floor
Columbus, OH 43215
(614) 466-5500, (800) 266-4346

Table of Contents

I. System requirements 1
II. How to Login 1
III. Session timeout 1
IV. Security Certificate 2
V. Maintenance and System Outages 2
VI. Forgotten password 3
VII. Forgotten User Name 3
VIII. Initial Screen and User Roles 3
a) The four Role IDs 3
IX. Who to call for help 4
X. Menus 4
a) Invoices menu 4
b) Reports menu 5
c) Maintenance menu 6
d) Print 7
e) Logout 7
XI. Invoice Entry – PASSPORT 8
a) Start New Invoice – PAA Administrator or PAA Operator Role 8
b) Start New Invoice – Provider Operator Role 9
c) Enter New Invoice 10
d) Next steps 13
XII. Invoice Entry – CHOICES 14
a) Enter New CHOICES Invoice 14
b) Next steps 17
XIII. Edit an Invoice 18
a) Remove Invoice 18
b) Search Detail Lines 18
XIV. Submit Invoice 21
XV. Generate a Coversheet 22
XVI. Invoice Status Views 23
a) Invoices by Status score card 23
b) Invoice Views Available 24
c) Filter the List 24
XVII. Reports 25
a) Invoice Report 25
b) Consumer List 27
c) Services List 29
d) Download EDI Reports 32

Direct Data Entry (DDE) User Manual

Date Updated	Ver	Description	Contributors	Update Author
09/15/2006	1.0	Initial Version	ODA IT Dept.	C. Brickner
01/04/2007	2.0	Program Changes	ODA IT Dept.	C. Brickner
02/06/2007	3.0	How to select a consumer in invoice entry	ODA IT Dept.	C. Brickner
05/23/2007	4.0	Choices added and other program changes	ODA IT Dept.	C. Brickner

Direct Data Entry (DDE) User Manual

Direct Data Entry (DDE) will replace the Data Entry Module (DEM) currently used by many Pre-Admission Screening System Providing Options and Resources Today (PASSPORT) providers to enter and submit PASSPORT Information Management System (PIMS) invoices to PASSPORT Administrative Agencies (PAAs).

Changes/updates made in PIMS to a consumer will be reflected in DDE system the following day. Updates from PIMS to the DDE system are made nightly.

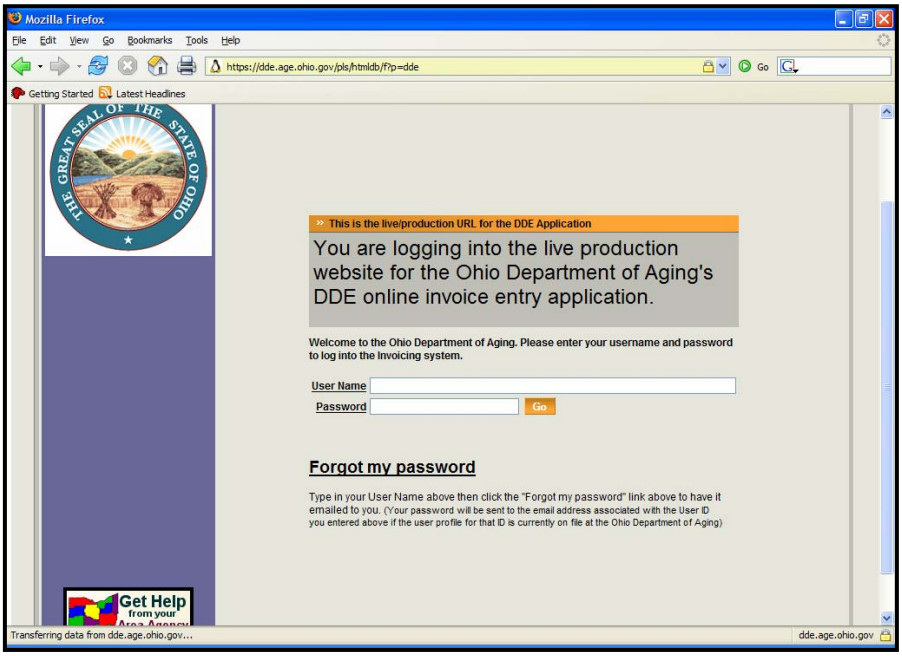
I. System requirements

The minimum PC requirements to utilize the DDE application are 512mb system memory and an operating system capable of running one of the following browser versions (or higher) with JavaScript "enabled".

Mozilla/4.0+, Mozilla/5.0+, MS Internet Explorer 6.0+, Gecko/20060728+, Firefox/1.5.0.6 +

II. How to Login

a) Open a browser.
b) In the address bar enter: https://dde.age.ohio.gov/
c) Press enter. This site can be bookmarked.
   - If prompted for a Security Certificate, proceed to Section IV. Security Certificate
d) Enter your user name and password provided to you by your PASSPORT Administrative Agency. Press enter. Username and password are not case-sensitive. If prompted by the browser to save password, decline.
e) Once logged in, change the password for the account by clicking on the Maintenance button and then click on Change Password.
f) If the user attempts to login with an invalid password and exceeds the number of attempts allowed by the system, the account will be disabled. Contact your PAA administrator regarding your account status.


Mozilla Firefox
File Edit View Go Bookmarks Tools Help
https://dde.age.ohio.gov/pls/htmldb/f?p=dde
Getting Started Latest Headlines
THE GREAT SEAL OF THE STATE OF OHIO
This is the live/production URL for the DDE Application
You are logging into the live production website for the Ohio Department of Aging's DDE online invoice entry application.
Welcome to the Ohio Department of Aging. Please enter your username and password to log into the Invoicing system.
User Name
Password
Go
Forgot my password
Type in your User Name above then click the "Forgot my password" link above to have it emailed to you. (Your password will be sent to the email address associated with the User ID you entered above if the user profile for that ID is currently on file at the Ohio Department of Aging)
Get Help from your
Transferring data from dde.age.ohio.gov...
dde.age.ohio.gov

III. Session timeout

The user's session will timeout after 60 minutes of inactivity. If, for a period of time, you leave the DDE application alone or perform actions (ex: scrolling, entering data, reading a downloaded report) that does not generate a call to the server, the application logs you out and you will be prompted to log in again. A timer will appear on the screen and count down to inform the user when the session will expire. Ex: YOUR SESSION WILL EXPIRE IN 00:59:48.

IV. Security Certificate

Accept the website certificate prompts from the web browser.

Security Alert
Information you exchange with this site cannot be viewed or changed by others. However, there is a problem with the site's security certificate.
The security certificate was issued by a company you have not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.
The security certificate date is valid.
The security certificate has a valid name matching the name of the page you are trying to view.
Do you want to proceed?
Yes
No
View Certificate

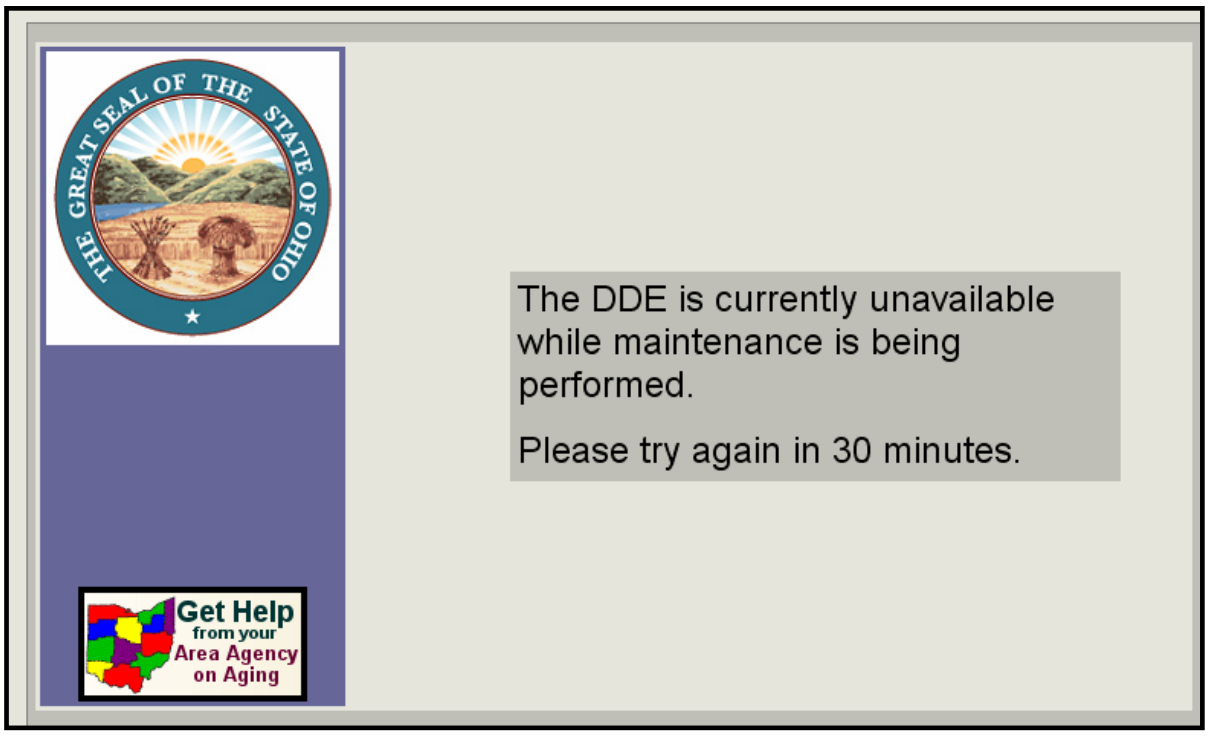
Example: Internet Explorer
Click Yes.

Website Certified by an Unknown Authority
Unable to verify the identity of dde.age.ohio.gov as a trusted site.
Possible reasons for this error:
- Your browser does not recognize the Certificate Authority that issued the site's certificate.
- The site's certificate is incomplete due to a server misconfiguration.
- You are connected to a site pretending to be dde.age.ohio.gov, possibly to obtain your confidential information.
Please notify the site's webmaster about this problem.
Before accepting this certificate, you should examine this site's certificate carefully. Are you willing to to accept this certificate for the purpose of identifying the Web site dde.age.ohio.gov?
Examine Certificate...
Accept this certificate permanently
Accept this certificate temporarily for this session
Do not accept this certificate and do not connect to this Web site
OK
Cancel

Example: Mozilla Firefox
Accept this certificate permanently and click Ok.

V. Maintenance and System Outages

When the DDE application is unavailable for maintenance, the following screen will appear.


THE GREAT SEAL OF THE STATE OF OHIO
The DDE is currently unavailable while maintenance is being performed.
Please try again in 30 minutes.
Get Help from your Area Agency on Aging

If there is a system outage and the application is unavailable, the screen will display text:

Page not found or Service Temporarily Unavailable. The server is temporarily unable to service your request due to maintenance downtime or capacity problems. Please try again later.

VI. Forgotten password

a) Type in your User Name then click, "**Forgot my password**" link.
b) The password will be sent to the email address associated with the User Name profile. A deactivated account cannot request their password to be reset.

VII. Forgotten User Name

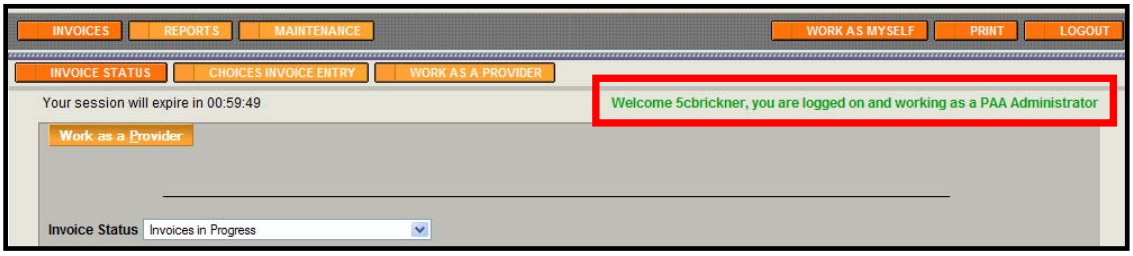
Contact your PAA for a forgotten User Name.

VIII. Initial Screen and User Roles

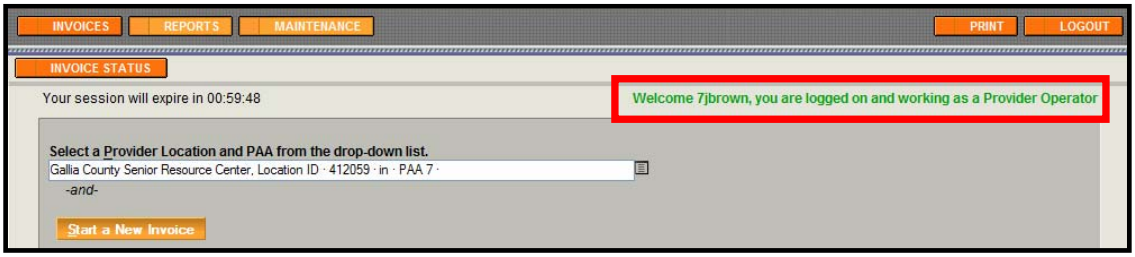
Once logged in, the initial screen will vary depending on your Role ID. The screen will indicate in green text your login Role ID. Ex: **Welcome 6vkorteprov, you are logged on and working as a Provider Operator**.

a) The four Role IDs
PAA Administrator – Controls accounts created under specific PAA and can perform data entry and view reports for provider operators within PAA
PAA Operator – Performs data entry and view reports for provider operators within PAA
Provider Operator Invoice and Reports – Performs data entry and can generate reports for their authorized locations in a PAA
Provider Operator Reports only – Generates reports for their authorized locations in a PAA
Fiscal Intermediary – Performs CHOICES data entry and can generate reports for their authorized PAA

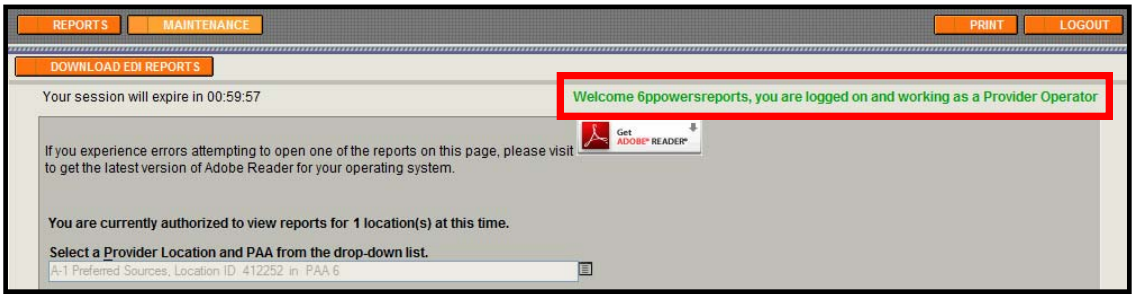
- PAA Administrator & PAA Operator Initial Screen



- Provider Operator - Invoice & Reports Initial Screen

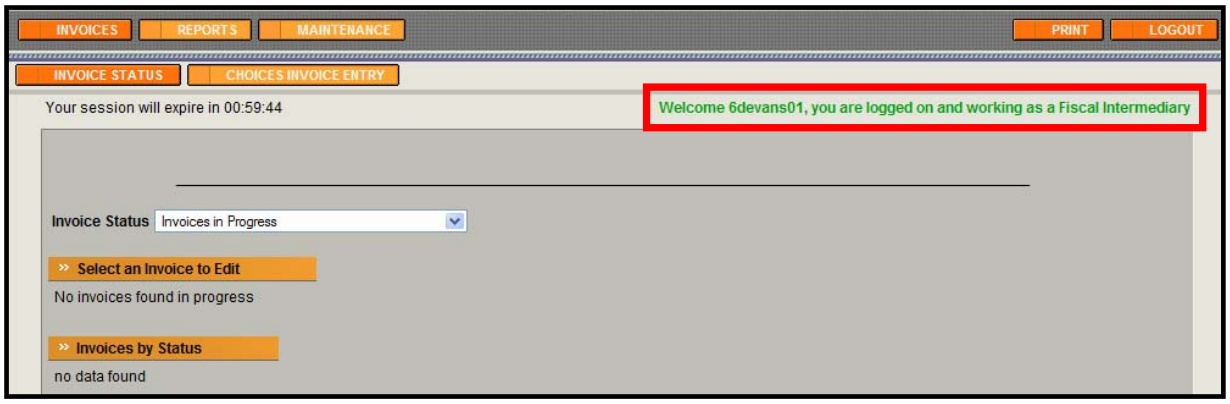

INVOICES
REPORTS
MAINTENANCE
PRINT
LOGOUT
INVOICE STATUS
Your session will expire in 00:59:48
Welcome 7jbrown, you are logged on and working as a Provider Operator
Select a Provider Location and PAA from the drop-down list.
Gallia County Senior Resource Center, Location ID · 412059 · in · PAA 7 ·
-and-
Start a New Invoice

- Provider Operator - Reports Only Initial Screen


REPORTS
MAINTENANCE
PRINT
LOGOUT
DOWNLOAD EDI REPORTS
Your session will expire in 00:59:57
Welcome 6ppowersreports, you are logged on and working as a Provider Operator
If you experience errors attempting to open one of the reports on this page, please visit
to get the latest version of Adobe Reader for your operating system.
You are currently authorized to view reports for 1 location(s) at this time.
Select a Provider Location and PAA from the drop-down list.
A-1 Preferred Sources, Location ID 412252 in PAA 6

VIII. Initial Screen and User Roles (con't.)

- Fiscal Intermediary – CHOICES Invoices Only Initial Screen



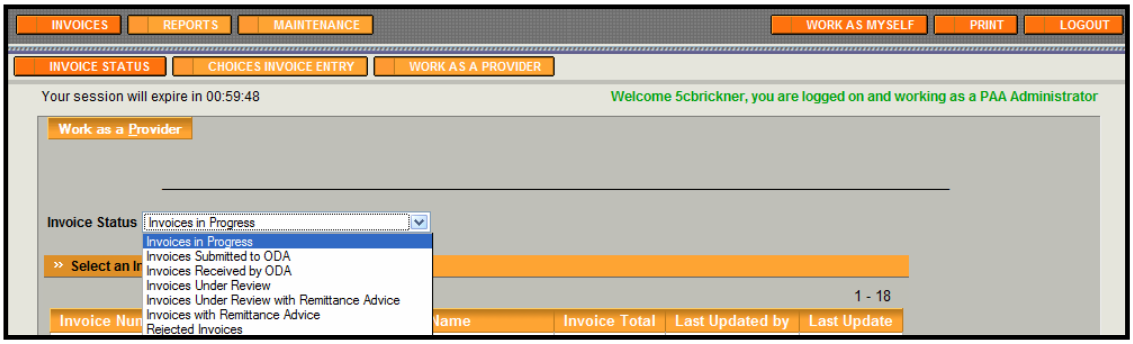
IX. Who to call for help

Contact your PAA for assistance with the application.

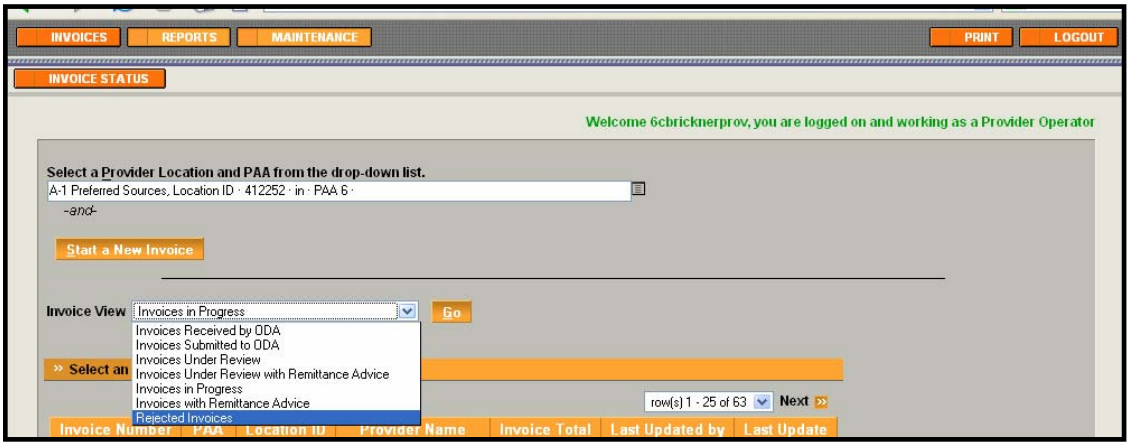
X. Menus

a) Invoices menu

- PAA Administrator and PAA Operator Roles
  - Displays sub-menus: Invoice Status, CHOICES Invoice entry and Work as a Provider.
  - Data displayed will vary according to the option selected from Invoice View.
  - To enter an invoice these Roles must work on behalf of a provider.



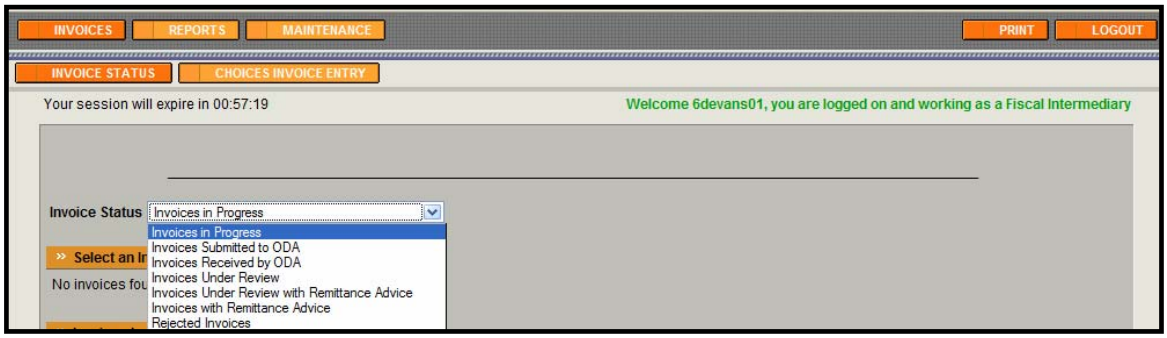
- Provider Operator Role
  - Displays sub-menus: Invoice Status.
  - Data displayed will vary according to the option selected from Invoice View.



X. Menus (con'.)

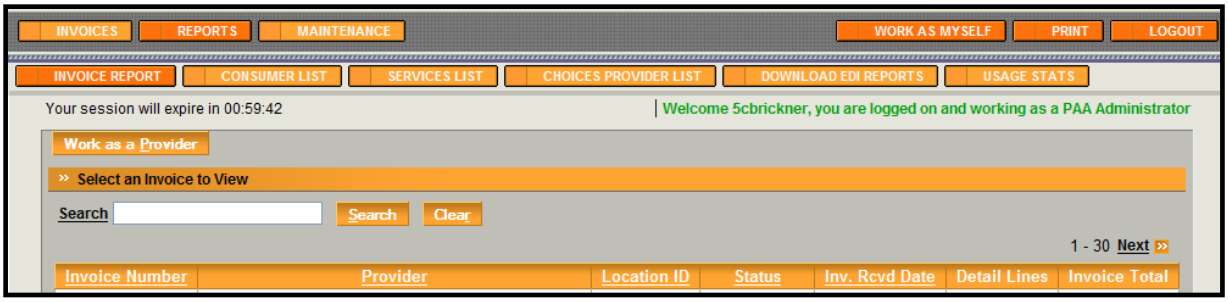
a) Invoices menu (con't.)

- Fiscal Intermediary Role
  - Displays sub-menus: Invoice Status and CHOICES Invoice Entry.
  - Data displayed will vary according to the option selected from Invoice View.



b) Reports menu
PAA Administrator and PAA Operator Roles

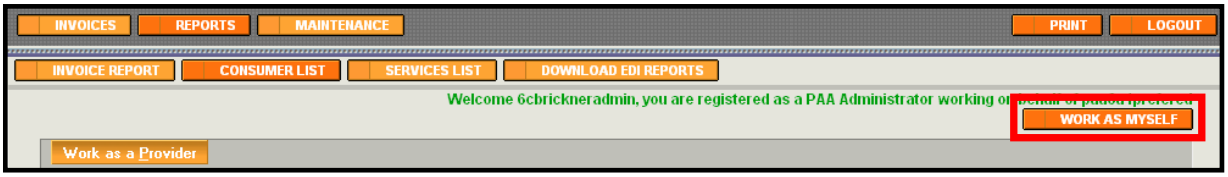
- Displays sub-menus: Invoice Report, Consumer List, Services List, CHOICES Provider List, Download EDI Reports and Usage Stats.
- You must either be logged in as a Provider Operator or be working on behalf of one to view the reports and use the Consumer List, Services List and Download EDI Reports sub-menus.



- Click on the "Work as a Provider" button to change who you are working on behalf of.

Your session will expire in 00:59:57
Welcome 5cbrickner, you are logged on and working as a PAA Administrator
Work as a Provider

- Click the Work As Myself button to logout of the provider location you are working on behalf of.



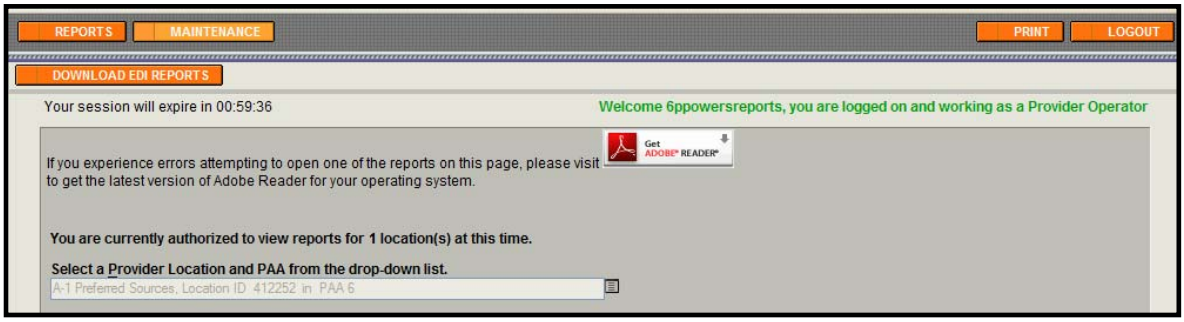
X. Menus (con't.)

b) Reports menu (con't.)
Provider Operator Role

- Displays sub-menus: Invoice Report, Consumer List, Services List and Download EDI Reports.

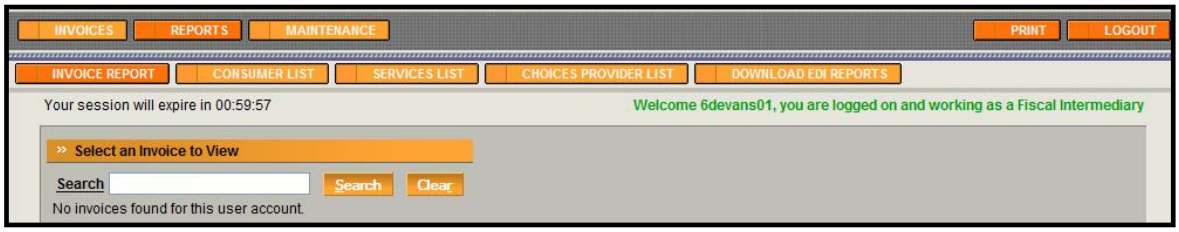
Provider Operator Reports Only Role

- Displays sub-menu: Download EDI Reports.


REPORTS
MAINTENANCE
PRINT
LOGOUT
DOWNLOAD EDI REPORTS
Your session will expire in 00:59:36
Welcome 6ppowersreports, you are logged on and working as a Provider Operator
If you experience errors attempting to open one of the reports on this page, please visit to get the latest version of Adobe Reader for your operating system.
Get ADOBE READER
You are currently authorized to view reports for 1 location(s) at this time.
Select a Provider Location and PAA from the drop-down list.
A-1 Preferred Sources, Location ID: 412252 in PAA 6

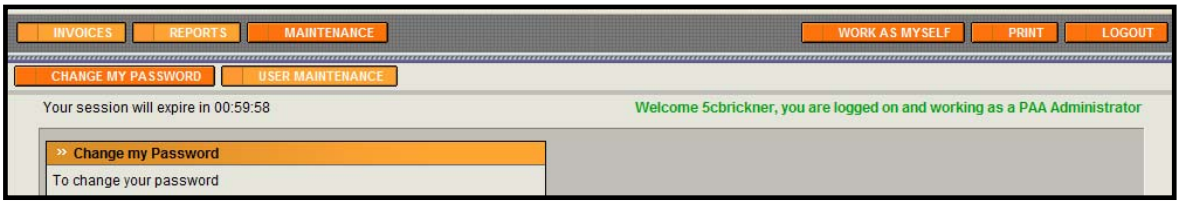
Fiscal Intermediary Role

- Displays sub-menus: : Invoice Report, Consumer List, Services List, CHOICES Provider List and Download EDI Reports.



c) Maintenance menu
PAA Administrator

- Displays sub-menus: Change My Password and User Maintenance.



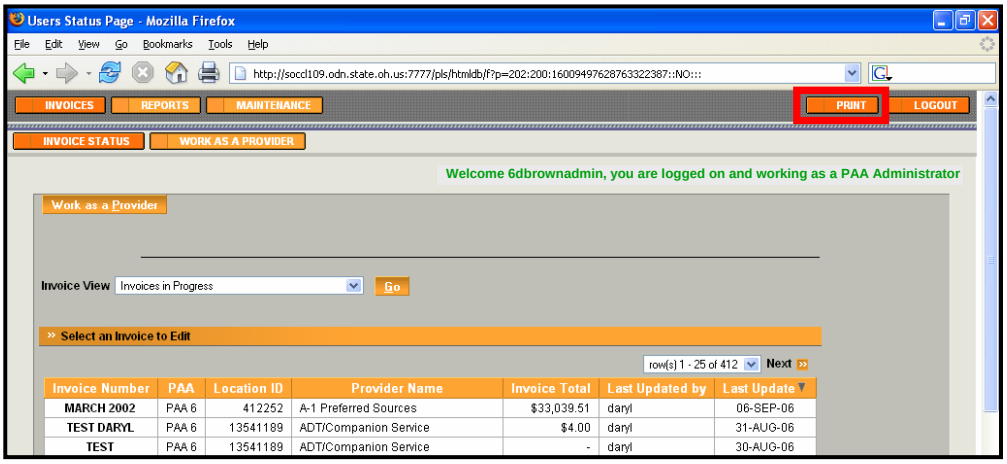
X. Menus (con't.)

c) Maintenance menu (con't.)
PAA Operator, Provider Operators, Provider Operators Reports only and Fiscal Intermediary Roles

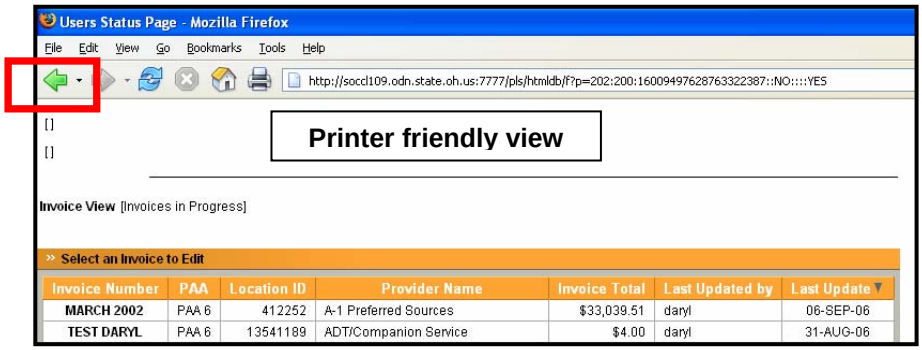
- Displays sub-menu: Change My Password.

d) Print
All Roles

- The Print button converts the information on the page to a printer friendly view.

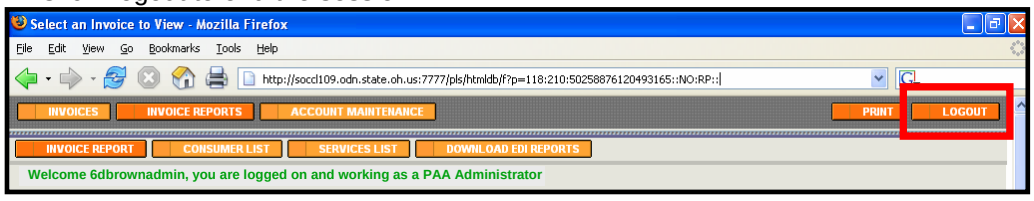


- Click the browser's back button to return to the application.



e) Logout
All Roles

- Click Logout to end the session.



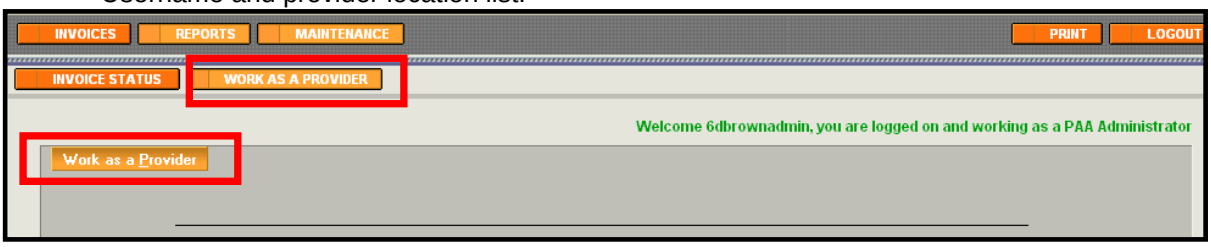
XI. Invoice Entry – PASSPORT

To enter an invoice you must be logged in as a Provider Operator, a PAA Administrator or PAA Operator working on behalf of a provider location.

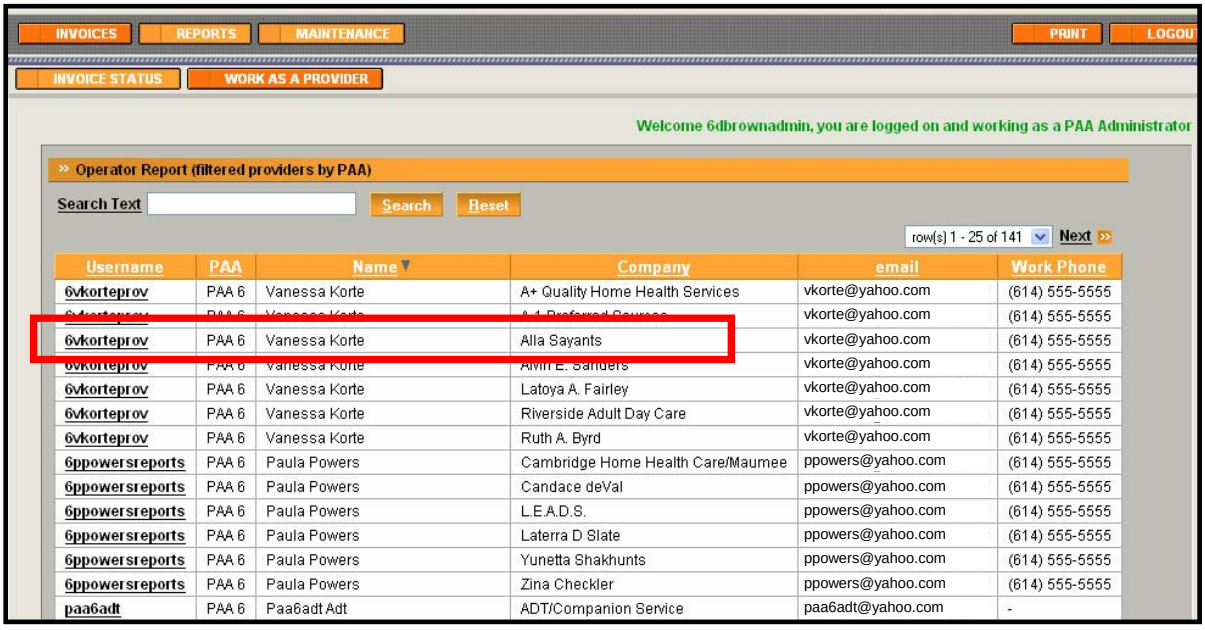
a) Start New Invoice – PAA Administrator or PAA Operator Role

THE PAA SHALL ONLY ENTER AN INVOICE ON BEHALF OF A PROVIDER ONCE THE PROVIDER HAS SUBMITTED THE INVOICE TO THE PAA IN PAPER FORM. AT NO TIME SHALL A PAA ENTER AN INVOICE INTO THE DDE APPLICATION FOR A PROVIDER UNTIL RECEIPT OF THIS PAPER INVOICE.

1. From the Invoices screen, click Work as a Provider. Either button will bring you to the Username and provider location list.

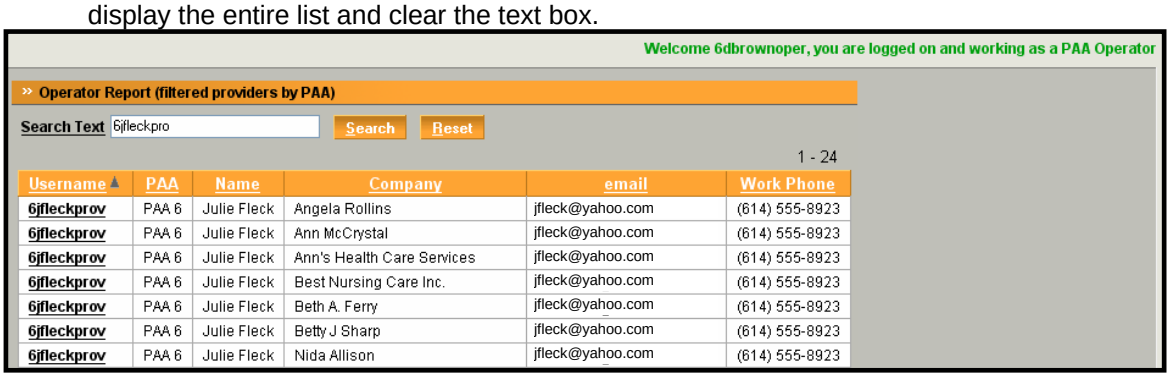


2. In the Company column, look for the correct provider location, select the Username. If necessary, click a column heading to sort the information in ascending or descending order.



Username	PAA	Name	Company	email	Work Phone
6vkorteprov	PAA 6	Vanessa Korte	A+ Quality Home Health Services	vkorte@yahoo.com	(614) 555-5555
[illegible]	PAA 6	Vanessa Korte	[illegible]	vkorte@yahoo.com	(614) 555-5555
6vkorteprov	PAA 6	Vanessa Korte	Alla Sayants	vkorte@yahoo.com	(614) 555-5555
6vkorteprov	PAA 6	Vanessa Korte	Alvin E. Sanders	vkorte@yahoo.com	(614) 555-5555
6vkorteprov	PAA 6	Vanessa Korte	Latoya A. Fairley	vkorte@yahoo.com	(614) 555-5555
6vkorteprov	PAA 6	Vanessa Korte	Riverside Adult Day Care	vkorte@yahoo.com	(614) 555-5555
6vkorteprov	PAA 6	Vanessa Korte	Ruth A. Byrd	vkorte@yahoo.com	(614) 555-5555
6ppowersreports	PAA 6	Paula Powers	Cambridge Home Health Care/Maumee	ppowers@yahoo.com	(614) 555-5555
6ppowersreports	PAA 6	Paula Powers	Candace deVal	ppowers@yahoo.com	(614) 555-5555
6ppowersreports	PAA 6	Paula Powers	L.E.A.D.S.	ppowers@yahoo.com	(614) 555-5555
6ppowersreports	PAA 6	Paula Powers	Laterra D Slate	ppowers@yahoo.com	(614) 555-5555
6ppowersreports	PAA 6	Paula Powers	Yunetta Shakhunts	ppowers@yahoo.com	(614) 555-5555
6ppowersreports	PAA 6	Paula Powers	Zina Checkler	ppowers@yahoo.com	(614) 555-5555
paa6adt	PAA 6	Paa6adt Adt	ADT/Companion Service	paa6adt@yahoo.com	-

3. To Search, enter a search string in the Search Text text box and click Search. Click Reset to display the entire list and clear the text box.



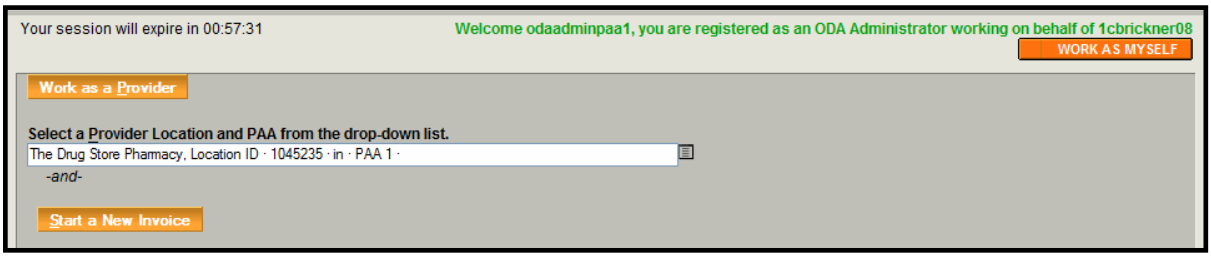
Username	PAA	Name	Company	email	Work Phone
6jfleckprov	PAA 6	Julie Fleck	Angela Rollins	jfleck@yahoo.com	(614) 555-8923
6jfleckprov	PAA 6	Julie Fleck	Ann McCrystal	jfleck@yahoo.com	(614) 555-8923
6jfleckprov	PAA 6	Julie Fleck	Ann's Health Care Services	jfleck@yahoo.com	(614) 555-8923
6jfleckprov	PAA 6	Julie Fleck	Best Nursing Care Inc.	jfleck@yahoo.com	(614) 555-8923
6jfleckprov	PAA 6	Julie Fleck	Beth A. Ferry	jfleck@yahoo.com	(614) 555-8923
6jfleckprov	PAA 6	Julie Fleck	Betty J Sharp	jfleck@yahoo.com	(614) 555-8923
6jfleckprov	PAA 6	Julie Fleck	Nida Allison	jfleck@yahoo.com	(614) 555-8923

XI. Invoice Entry (con't.)

a. Start New Invoice – PAA Administrator or PAA Operator Role (con't.)

4. Once a Username is selected, the application will indicate the Username you a working on behalf of.

   Ex: **Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6vkorteprov**

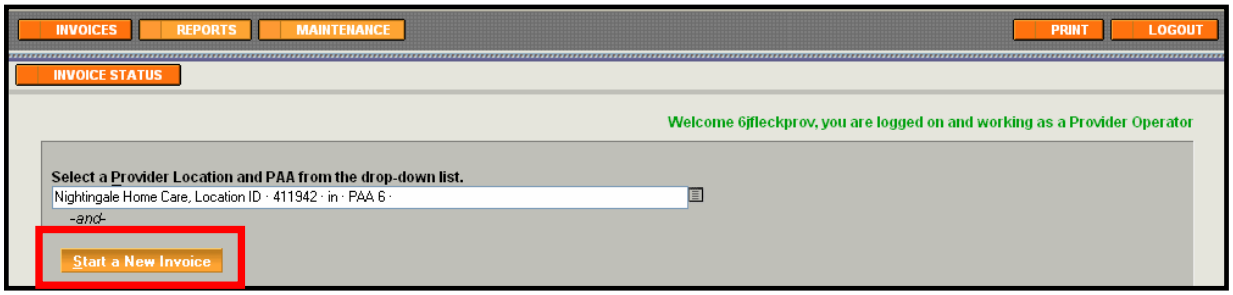

Your session will expire in 00:57:31
Welcome odaadminpaa1, you are registered as an ODA Administrator working on behalf of 1cbrickner08
WORK AS MYSELF
Work as a Provider
Select a Provider Location and PAA from the drop-down list.
The Drug Store Pharmacy, Location ID · 1045235 · in · PAA 1 ·
-and-
Start a New Invoice

5. Click Start a New Invoice. **Proceed to Section XI. c) Enter New Invoice**.

Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6jfleckprov
WORK AS MYSELF
Work as a Provider
Select a Provider Location and PAA from the drop-down list.
Nightingale Home Care, Location ID · 411942 · in · PAA 6 ·
-and-
Start a New Invoice

b) Start New Invoice – Provider Operator Role

1. Login as a Provider Operator.
2. Click Start a New Invoice. **Proceed to Section XI. c) Enter New Invoice**.

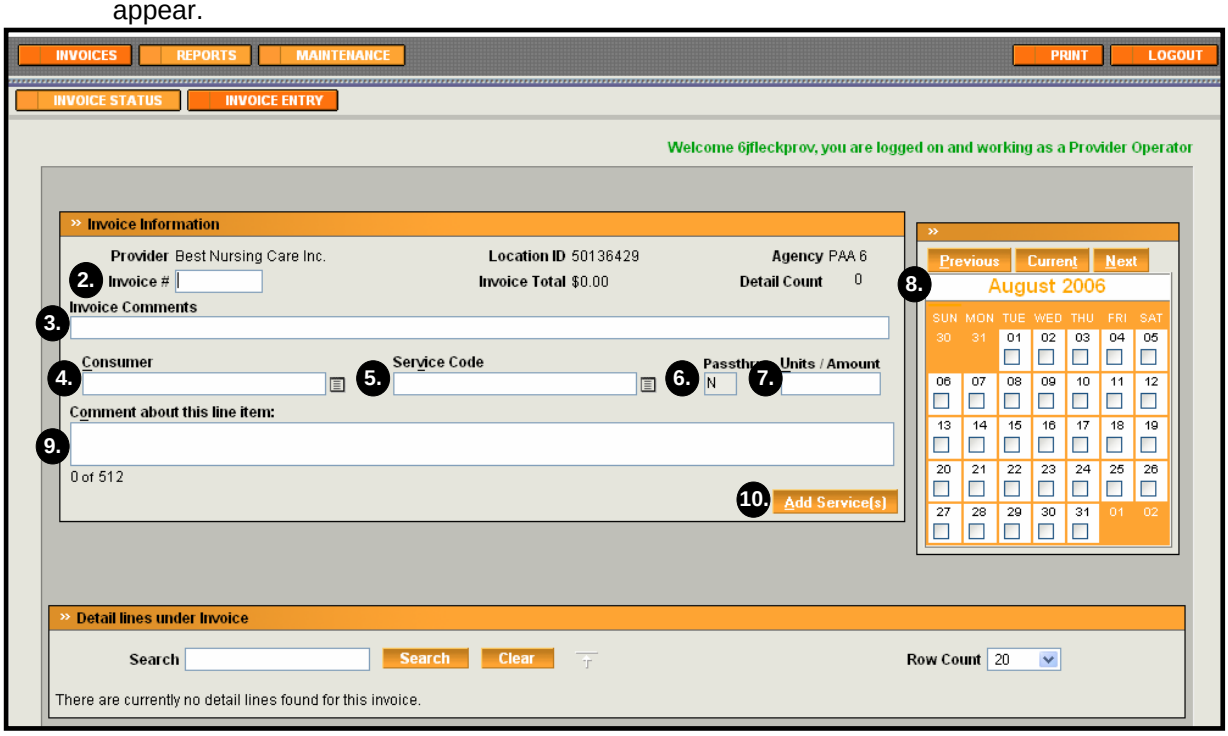

INVOICES
REPORTS
MAINTENANCE
PRINT
LOGOUT
INVOICE STATUS
Welcome 6jfleckprov, you are logged on and working as a Provider Operator
Select a Provider Location and PAA from the drop-down list.
Nightingale Home Care, Location ID · 411942 · in · PAA 6 ·
-and-
Start a New Invoice

XI. Invoice Entry (con't.)

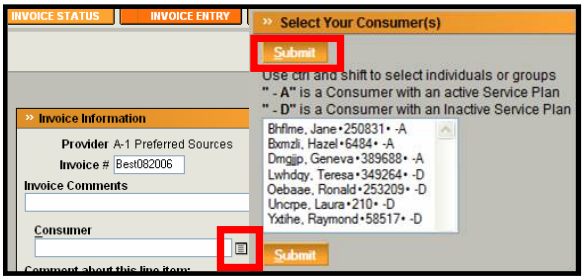
c) Enter New Invoice

- User is logged in as a Provider Operator, a PAA Admin or PAA Operator working on behalf of a provider location.
- An invoice draft is automatically saved in the system and added to the "Invoices in Progress" list, once the Add Service(s) button is clicked and remains in "Invoices in Progress" status until submitted.
- Data is saved every time an action/modification is made to the invoice.
- To remove an entire invoice before submitting, click Remove Invoice button.
- To submit an invoice, click Submit Invoice button. **Submitted invoices cannot be changed.**

1. From the Invoices screen, click Start a New Invoice. The blank Invoice Entry screen will appear.



2. **Invoice #**: Enter an invoice number. Character limit is 10 characters.
3. **Invoice Comments**: If necessary, enter a comment to describe the invoice.
4. **Consumer**:

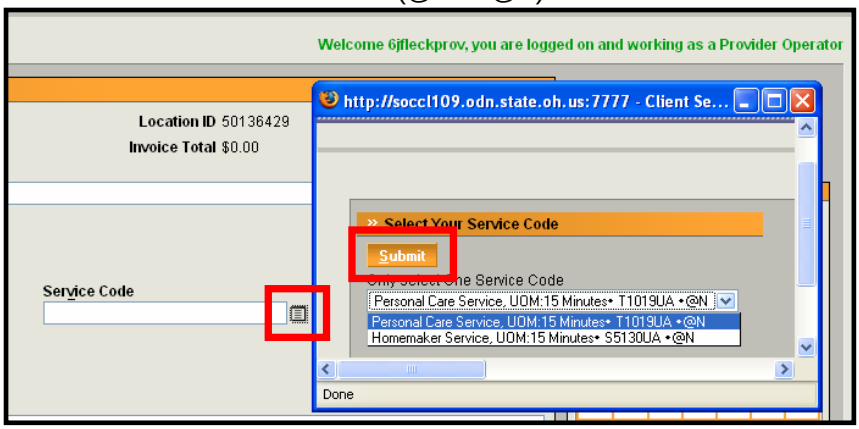

INVOICE STATUS
INVOICE ENTRY
Select Your Consumer(s)
Submit
Use ctrl and shift to select individuals or groups
" - A" is a Consumer with an active Service Plan
" - D" is a Consumer with an Inactive Service Plan
Invoice Information
Provider A-1 Preferred Sources
Invoice # Best082006
Invoice Comments
Consumer
Submit

   - Click the Consumer list icon to populate a list of consumers. The consumers listed are specific to the Location ID selected.
     - An "A" after a name is a consumer with an active Service Plan. These are sorted first.
     - A "D" after a name is a consumer with an Inactive Service Plan.
     - To select individual (non-adjacent) consumer(s), hold the CTRL key down and left click on the consumer's name.
     - To select a range (group) of consumers, left click on the first name of the range then hold down the left mouse button and drag the cursor to the last name of the range. Release the mouse button.
   - Click Submit to select the consumer(s).
   - Or type any part of the consumers first or last name or consumer number. Select the consumer from the list that populates.

XI. Invoice Entry (con't.)

c. Enter New Invoice (con't.)

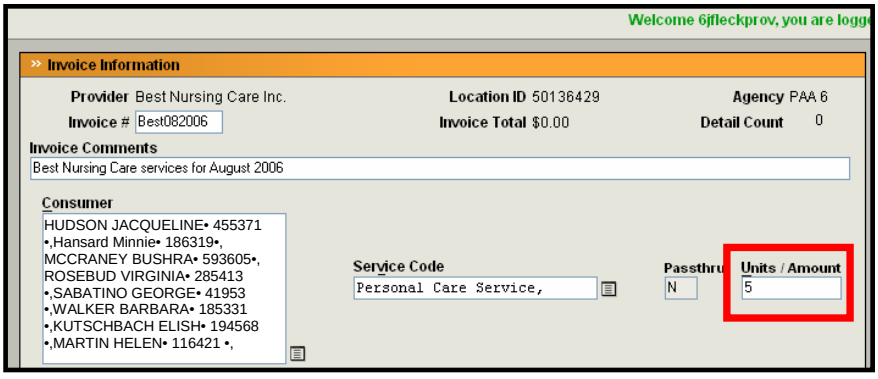
5. **Service Code**:
   - Click the Service Code list icon to populate the list of available Service Codes. Select only one Service Code and click Submit.
   - Or type the first characters(s) of the service code description or the service code number. Select the service code from the list that populates.
   - Displayed will be a description of the service code, unit of measure, service code number and if it is a Passthru or not (@N or @Y).


Welcome 6jfleckprov, you are logged on and working as a Provider Operator
Location ID 50136429
Invoice Total $0.00
http://soccl109.odn.state.oh.us:7777 - Client Se...
Select Your Service Code
Submit
Service Code
Personal Care Service, UOM:15 Minutes• T1019UA •@N
Personal Care Service, UOM:15 Minutes• T1019UA •@N
Homemaker Service, UOM:15 Minutes• S5130UA •@N
Done

6. **Passthru**:
   - The user cannot change the Passthru code. The value is based on the Service Code selected.
   - If you attempt to change the Passthru code, an error will appear.

http://soccl109.odn.state.oh.us:7777
You cannot select Passthru, it is here as display only. It is based on the value you selected for Service Code.
OK

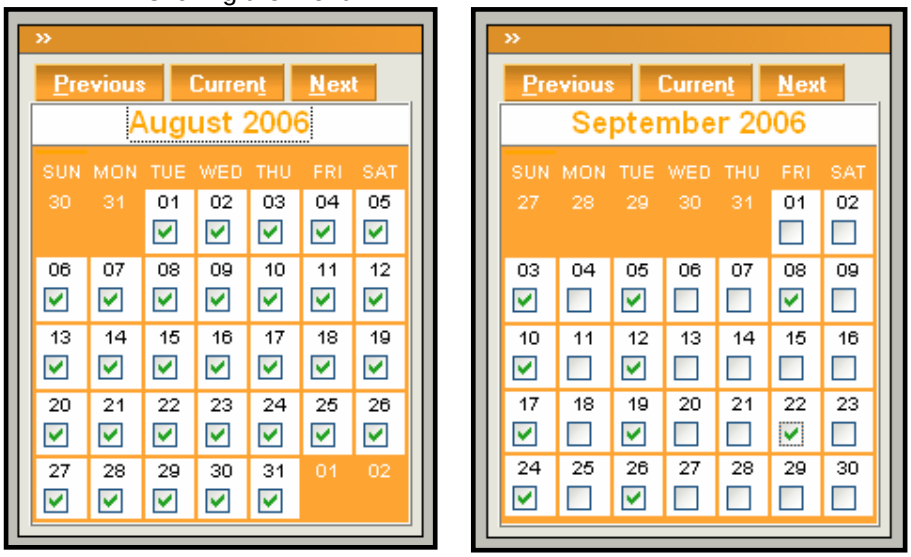
7. **Units/Amount**:
   - When the service code is a non-passthru (Passthru = N), then a whole number (positive or negative) is entered. Amounts do not appear for non-passthru services. Amounts will be applied when the PASSPORT agency receives the invoice.
   - When the service code is a passthru (Passthru = Y), enter the appropriate dollar amount for the passthru services.
   - If an incorrect value is entered, an error message will appear: Units/Amount must be entered as whole numbers (positive or negative). Partial units (decimals or fractions) are not permitted by rule. Please correct the "Units/Amount" field and then resubmit.


Welcome 6jfleckprov, you are logg
Invoice Information
Provider Best Nursing Care Inc.
Location ID 50136429
Agency PAA 6
Invoice # Best082006
Invoice Total $0.00
Detail Count 0
Invoice Comments
Best Nursing Care services for August 2006
Consumer
HUDSON JACQUELINE• 455371 •,Hansard Minnie• 186319•, MCCRANEY BUSHRA• 593605•, ROSEBUD VIRGINIA• 285413 •,SABATINO GEORGE• 41953 •,WALKER BARBARA• 185331 •,KUTSCHBACH ELISH• 194568 •,MARTIN HELEN• 116421 •,
Service Code
Personal Care Service,
Passthru
N
Units / Amount
5

XI. Invoice Entry (con't.)

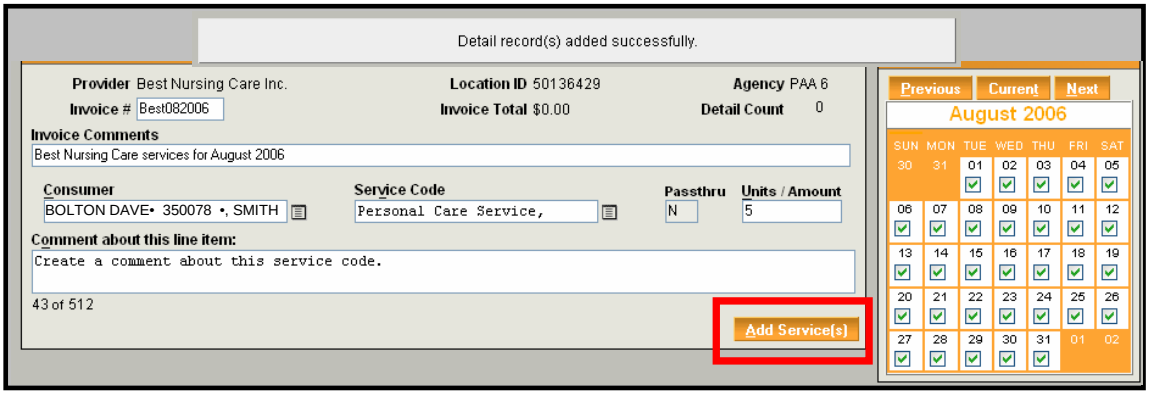
c. Enter New Invoice (con't.)

8. **Service Date(s)**:
   - At least one Service Date must be selected from the calendar.
   - Click Previous to display the previous month, click Current to display the current month and click Next to display the next month.
   - Date(s) can be selected by:
     - Clicking the check box under the date to select an individual day or days
     - Clicking the name of the week (Sun, Mon, etc.) to select all those days for the month
     - Clicking the month to select all the days in that month
   - Date(s) can be de-selected by:
     - Clicking the checkmark on the individual date(s)
     - Clicking the name of the week
     - Clicking the month



9. **Comment about this line item**:
   - If necessary, type a comment about this service code. Limit of 512 characters.

10. **Add Service(s)**:
    - After consumer(s), service code, date(s) and comments are selected/entered; click Add Service(s).
    - This will populate the Detail Lines section and a confirmation will be generated by the system: Detail record(s) added successfully.

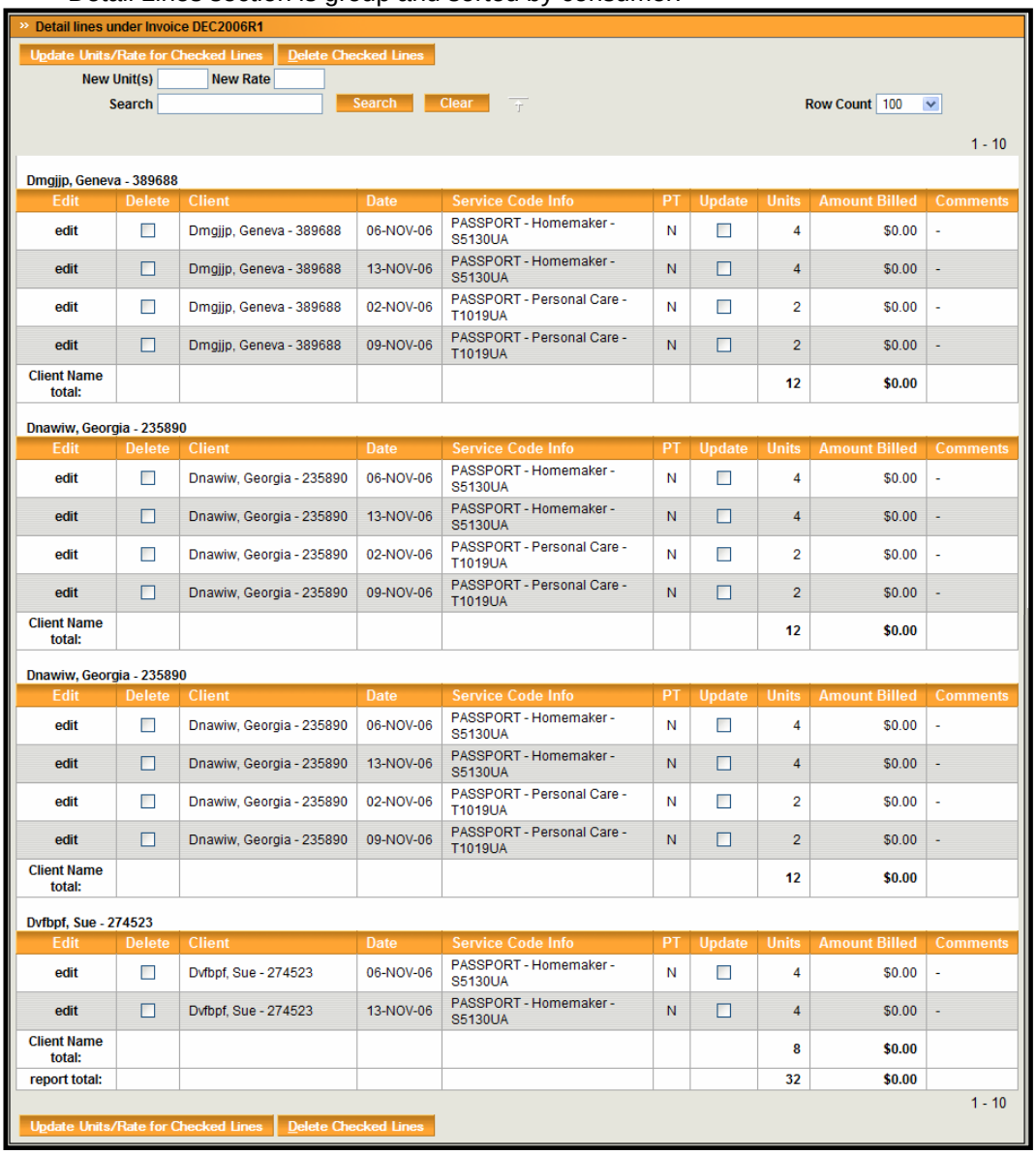


XI. Invoice Entry (con't.)

c. Enter New Invoice (con't.)

11. **Detail Lines**:

- Detail Lines section is group and sorted by consumer.



» Detail lines under Invoice DEC2006R1

Update Units/Rate for Checked Lines | Delete Checked Lines

New Unit(s) | New Rate

Search | Search | Clear | Row Count 100

1 - 10

Dmgjjp, Geneva - 389688

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dmgjjp, Geneva - 389688	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dmgjjp, Geneva - 389688	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dmgjjp, Geneva - 389688	02-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
edit	☐	Dmgjjp, Geneva - 389688	09-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
Client Name total:							12	$0.00	

Dnawiw, Georgia - 235890

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dnawiw, Georgia - 235890	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	02-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	09-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
Client Name total:							12	$0.00	

Dnawiw, Georgia - 235890

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dnawiw, Georgia - 235890	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	02-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
edit	☐	Dnawiw, Georgia - 235890	09-NOV-06	PASSPORT - Personal Care - T1019UA	N	☐	2	$0.00	-
Client Name total:							12	$0.00	

Dvfbpf, Sue - 274523

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comments
edit	☐	Dvfbpf, Sue - 274523	06-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
edit	☐	Dvfbpf, Sue - 274523	13-NOV-06	PASSPORT - Homemaker - S5130UA	N	☐	4	$0.00	-
Client Name total:							8	$0.00	
report total:							32	$0.00	

1 - 10

Update Units/Rate for Checked Lines | Delete Checked Lines

d) Next steps

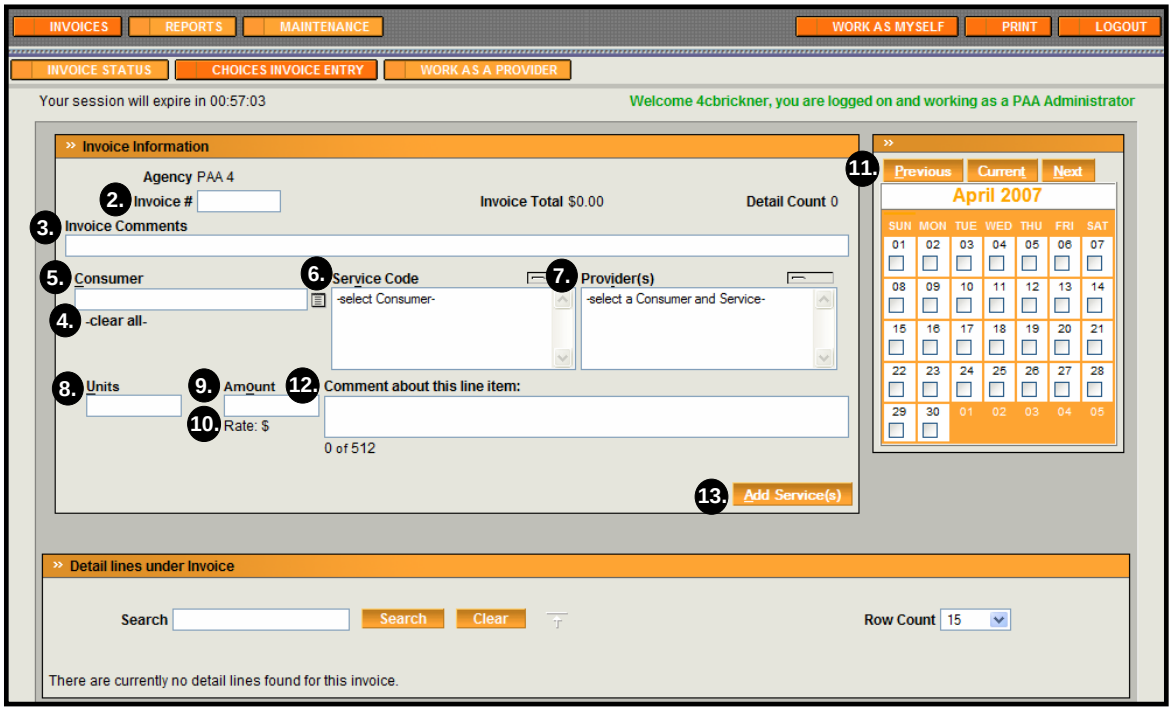
- Repeat steps 4 thru 10 to bill additional service(s) for a consumer(s) on same invoice.
  or
- Edit the invoice before submitting. Proceed to Section XIII. Edit an Invoice.
  or
- Stop and finish the invoice later. Once the Add Service(s) button is clicked or when an action/modification is made to the invoice, an invoice draft is saved and added to the "Invoices in Progress" list. Proceed to Section XVI. Invoice Status Views.
  or
- Submit the invoice, proceed to Section XIV. Submit Invoice.

XII. Invoice Entry – CHOICES

- User is logged in as a PAA Admin or PAA Operator or Fiscal Intermediary.
- An invoice draft is automatically saved in the system and added to the "Invoices in Progress" list, once the Add Service(s) button is clicked and remains in "Invoices in Progress" status until submitted.
- Data is saved every time an action/modification is made to the invoice.
- To remove an entire invoice before submitting, click Remove Invoice button.
- To submit an invoice, click Submit Invoice button. Submitted invoices cannot be changed.

a) Enter New CHOICES Invoice

1. From the Invoices screen, click CHOICES Invoice Entry. The blank Invoice Entry screen will appear.



2. **Invoice #**: Enter an invoice number. Character limit is 10 characters.
3. **Invoice Comments**: If necessary, enter a comment to describe the invoice.
4. **Clear All**: Click clear all to clear all entries in the Invoice Information area.
5. **Consumer**:
   - Click the Consumer list icon to populate a list of consumers. The consumers listed are specific to the Location ID selected.
   - Select only one consumer and click Submit to select the consumer(s).
   - Or type any part of the consumers first or last name or consumer number. Select the consumer from the list that populates.
6. **Service Code**:
   - Click the Service Code list icon to populate the list of available Service Codes. Select only one Service Code and click Submit.
   - Or type the first characters(s) of the service code description or the service code number. Select the service code from the list that populates.
   - Selecting a different Service Code may result in additional/different Providers for this Consumer.
   - To have the authorized Provider(s) appear, a single valid Consumer and a valid Service Code must be selected.
   - "No Services Found" is not a valid selection in Service Code field.

XI. Invoice Entry *(con't.)*

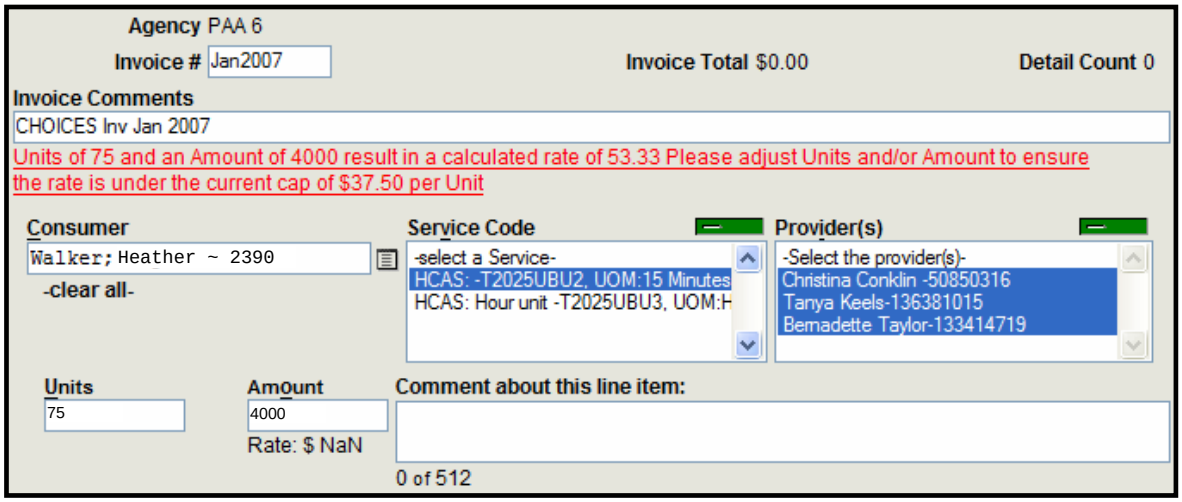
a) Enter New CHOICES Invoice (con't.)

7. **Provider(s)**:
   - Select at least one valid Provider from the list provided.
   - More than one valid Provider can be selected.
   - Selecting a different Service Code may result in additional/different Provider(s) for the Consumer selected.
   - To have the authorized Provider(s) appear, a single valid Consumer and a valid Service Code must be selected.
   - "Select a Consumer and Service" is not a valid selection in Provider(s) field.
   - "No Provider(s) Found" is not a valid selection in Provider(s) field.

8. **Units**:
   - Enter the Units of service provided to the Consumer by the selected Provider(s).
   - If more than one Provider is selected, the Units are applied to each Provider at the amount entered in this field.

9. **Amount:**
   - Enter the total "Amount'" (Units times Rate) that is to be paid to the Provider(s) for the selected Service for Units entered. This is a daily "Amount" and will be carried over to all Service Dates selected in the calendar.
   - If more than one Provider is selected, the Amount is applied to each Provider selected.

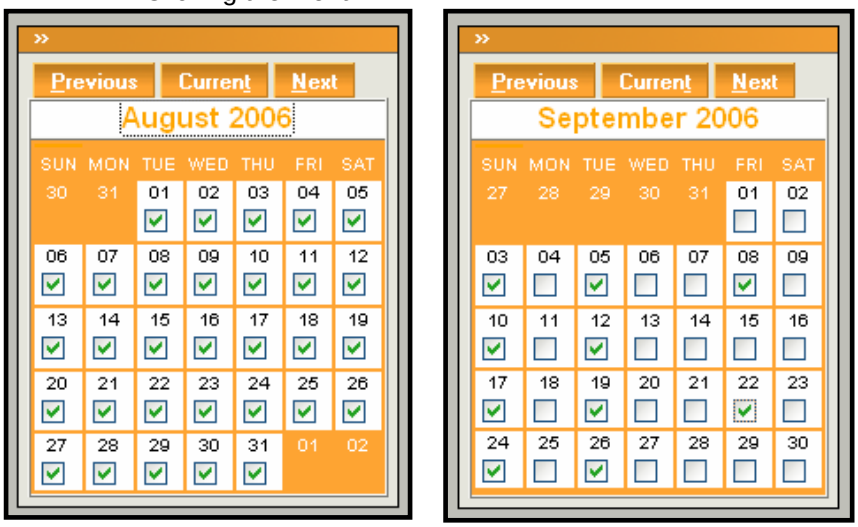
10. **Rate:**
    - Rate cap is $37.50. If the calculated rate exceeds the $37.50 amount, an error message will display.
      Units of XX and an Amount of XXXX result in a calculated rate of XX.XX Please adjust Units and/or Amount to ensure the rate is under the current cap of $37.50 per Unit.



XI. Invoice Entry *(con't.)*

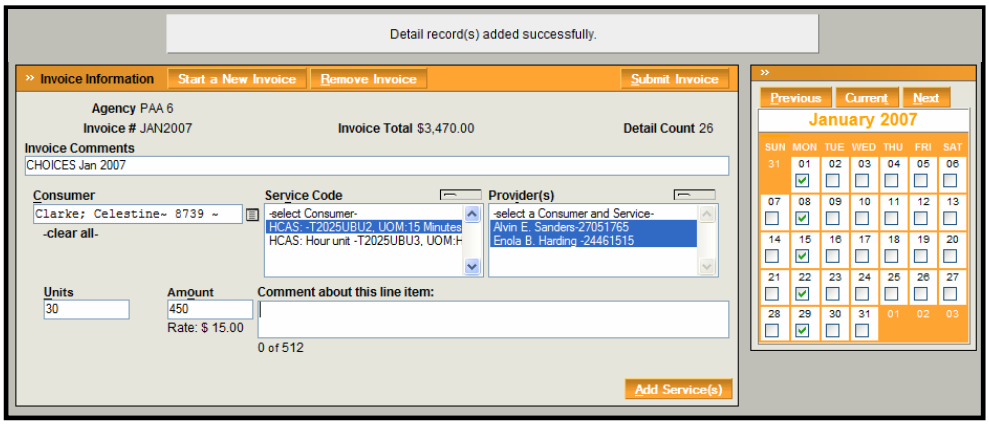
a) Enter New CHOICES Invoice (con't.)

11. **Service Date(s)**:
    - At least one Service Date must be selected from the calendar.
    - Click Previous to display the previous month, click Current to display the current month and click Next to display the next month.
    - Date(s) can be selected by:
        - Clicking the check box under the date to select an individual day or days
        - Clicking the name of the week (Sun, Mon, etc.) to select all those days for the month
        - Clicking the month to select all the days in that month
    - Date(s) can be de-selected by:
        - Clicking the checkmark on the individual date(s)
        - Clicking the name of the week
        - Clicking the month



12. **Comment about this line item**:
    - If necessary, type a comment about this service code. Limit of 512 characters.

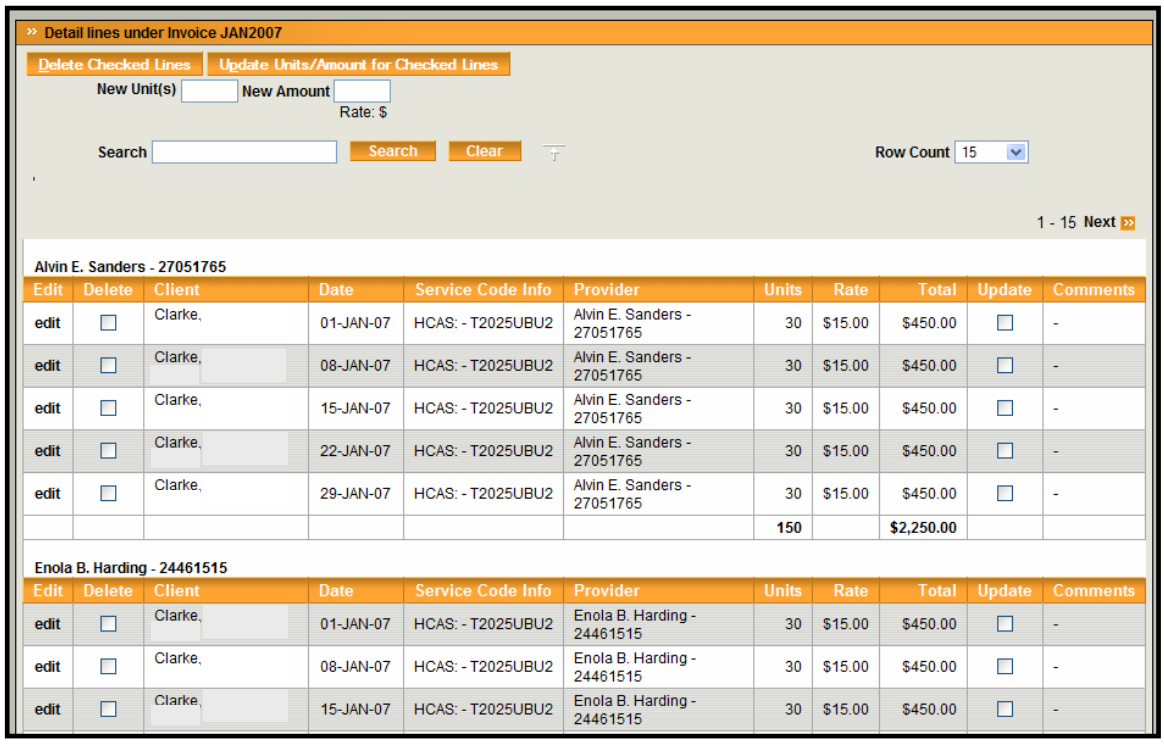
13. **Add Service(s)**:
    - After consumer, service code, provider(s), Units, Amount, Date(s) and comments are selected/entered; click Add Service(s).
    - This will populate the Detail Lines section and a confirmation will be generated by the system: Detail record(s) added successfully.



XI. Invoice Entry *(con't.)*

a) Enter New CHOICES Invoice (con't.)

14. **Detail Lines**:
    - Detail Lines section is group and sorted by consumer.



» Detail lines under Invoice JAN2007

Delete Checked Lines | Update Units/Amount for Checked Lines

New Unit(s) | New Amount | Rate: $

Search | Search | Clear | Row Count 15

1 - 15 Next

Alvin E. Sanders - 27051765

Edit	Delete	Client	Date	Service Code Info	Provider	Units	Rate	Total	Update	Comments
edit	☐	Clarke,	01-JAN-07	HCAS: - T2025UBU2	Alvin E. Sanders - 27051765	30	$15.00	$450.00	☐	-
edit	☐	Clarke,	08-JAN-07	HCAS: - T2025UBU2	Alvin E. Sanders - 27051765	30	$15.00	$450.00	☐	-
edit	☐	Clarke,	15-JAN-07	HCAS: - T2025UBU2	Alvin E. Sanders - 27051765	30	$15.00	$450.00	☐	-
edit	☐	Clarke,	22-JAN-07	HCAS: - T2025UBU2	Alvin E. Sanders - 27051765	30	$15.00	$450.00	☐	-
edit	☐	Clarke,	29-JAN-07	HCAS: - T2025UBU2	Alvin E. Sanders - 27051765	30	$15.00	$450.00	☐	-
						150		$2,250.00		

Enola B. Harding - 24461515

Edit	Delete	Client	Date	Service Code Info	Provider	Units	Rate	Total	Update	Comments
edit	☐	Clarke,	01-JAN-07	HCAS: - T2025UBU2	Enola B. Harding - 24461515	30	$15.00	$450.00	☐	-
edit	☐	Clarke,	08-JAN-07	HCAS: - T2025UBU2	Enola B. Harding - 24461515	30	$15.00	$450.00	☐	-
edit	☐	Clarke,	15-JAN-07	HCAS: - T2025UBU2	Enola B. Harding - 24461515	30	$15.00	$450.00	☐	-

b) Next steps

- Repeat steps 4 thru 13 to bill additional service(s) for a consumer(s) on same invoice.
  or
- Click the Start a New Invoice button to start a new invoice. The invoice that was not submitted is saved in Work in Progress.

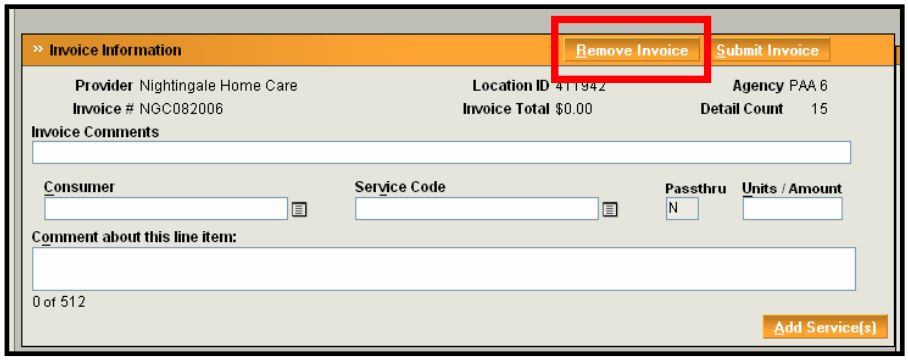
  Start a New Invoice

  or
- Edit the invoice before submitting. Proceed to Section XIII. Edit an Invoice.
  or
- Stop and finish the invoice later. Once the Add Service(s) button is clicked or when an action/modification is made to the invoice, an invoice draft is saved and added to the "Invoices in Progress" list. Proceed to Section XVI. Invoice Status Views.
  or
- Submit the invoice, proceed to Section XIV. Submit Invoice.

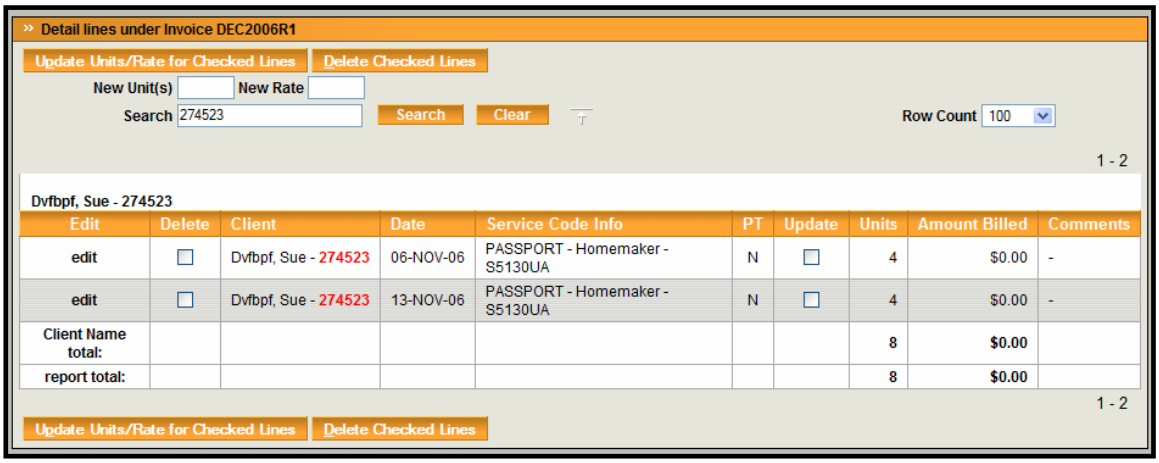
XIII. Edit an Invoice

- User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location.
- Click Invoices button to display the Invoices Status screen. Select the invoice to be edited from the Invoices in Progress table.

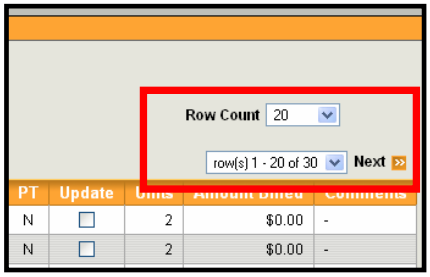
a) Remove Invoice
- To remove an entire invoice before submitting, click Remove Invoice button. A deleted invoice cannot be recovered.



b) Search Detail Lines
- To conduct a search, enter the text or date in the Search text box. The Client, Date and Service Code Info columns will be searched.
- Click Search. The system will return the result of the search.
- Click Clear to clear out the results of the search and display all detail lines of the invoice.


Detail lines under Invoice DEC2006R1
Update Units/Rate for Checked Lines
Delete Checked Lines
New Unit(s)
New Rate
Search 274523
Search
Clear
Row Count 100
1 - 2
Dvfbpf, Sue - 274523
Edit | Delete | Client | Date | Service Code Info | PT | Update | Units | Amount Billed | Comments
edit | Dvfbpf, Sue - 274523 | 06-NOV-06 | PASSPORT - Homemaker - S5130UA | N | 4 | $0.00 | -
edit | Dvfbpf, Sue - 274523 | 13-NOV-06 | PASSPORT - Homemaker - S5130UA | N | 4 | $0.00 | -
Client Name total: | 8 | $0.00
report total: | 8 | $0.00
1 - 2
Update Units/Rate for Checked Lines
Delete Checked Lines

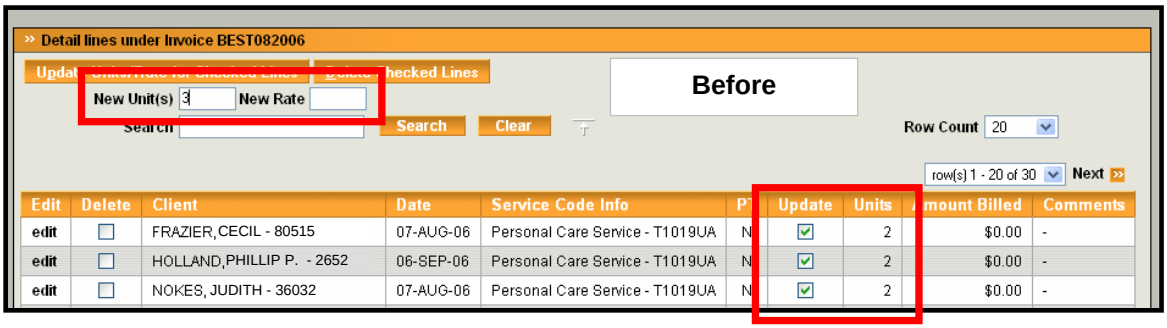
c) Edit Detail lines
1. **Detail line Row Count**:
   - The first 20 rows of billing detail is displayed. Click the Next button to show the next 20 rows. Click the Previous button to show the previous 20 rows.
   - Click the drop down next to row count to display additional rows. Up to 10,000 rows can be displayed.

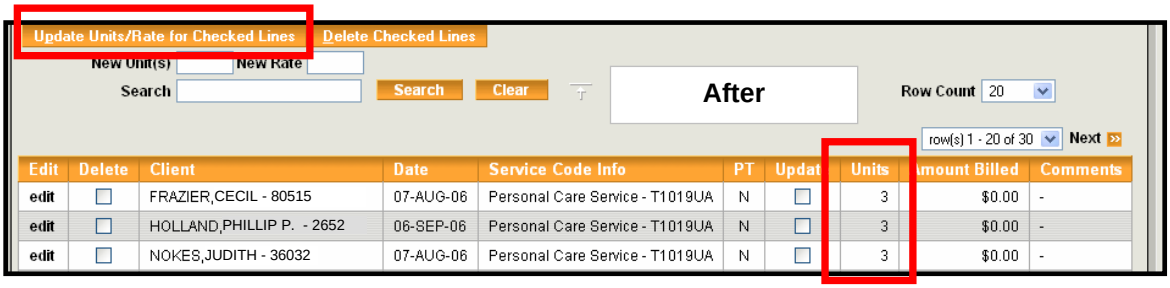


XIII. Edit an Invoice (con't.)

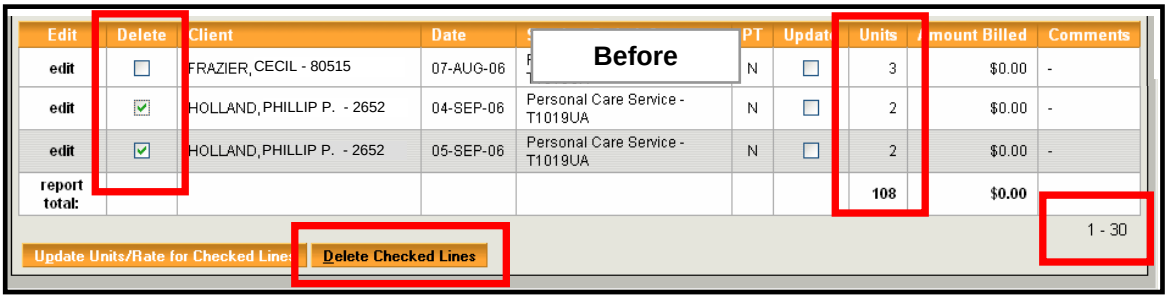
c) Edit Detail lines (con't.)

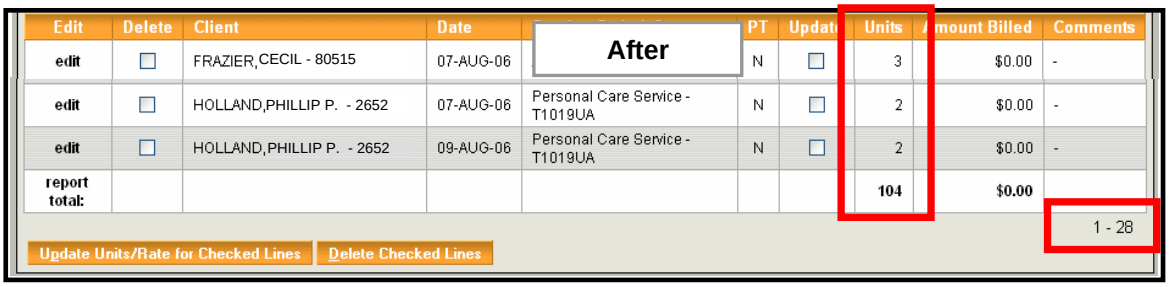
2. **Update Units/Rate for Checked Line(s)**
   - To edit the unit or rate for a line(s), click the Update checkbox for the specific line/client.
   - In the New Unit(s) or New Rate text box, enter the revised value.
   - Click Update Units/Rate for Checked Lines button.
   - Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested.





3. **Delete Checked Lines**
   - To delete a line(s) from the invoice, click the Delete checkbox for the specific line/client.
   - Click Delete Checked Lines button to remove the line(s) from the invoice.



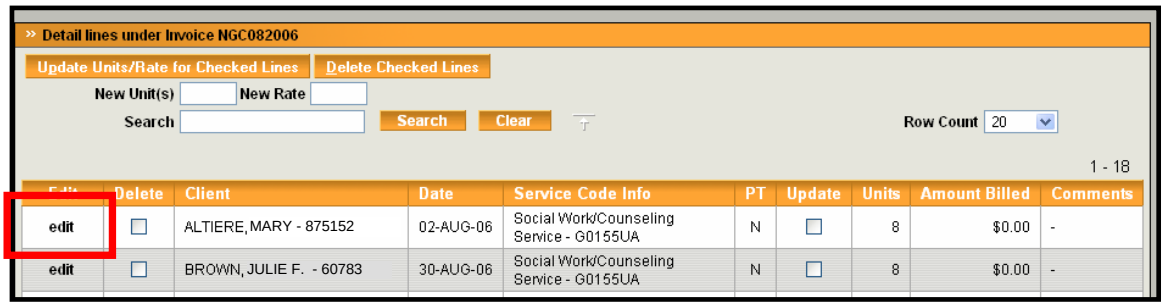


XIII. Edit an Invoice (con't.)

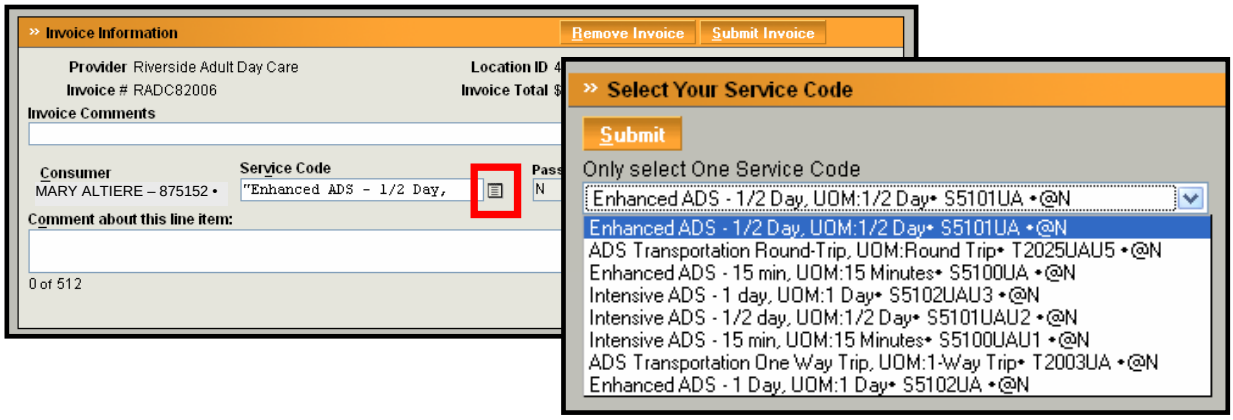
c) Edit Detail lines (con't.)

4. **Edit an Individual Line**

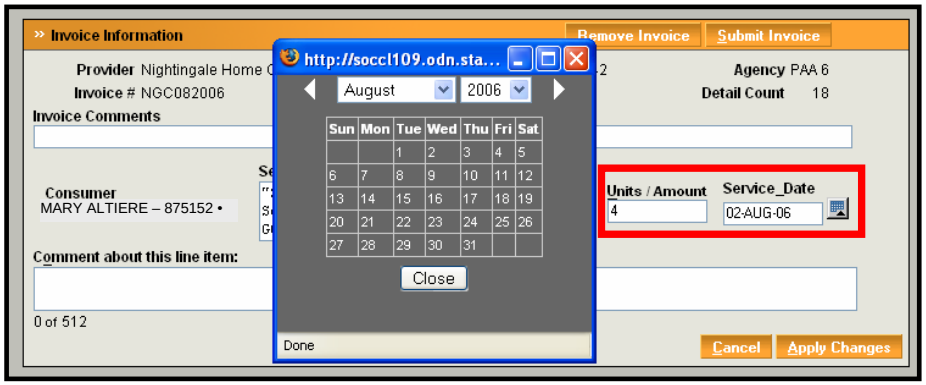
- Click **edit** next to the individual client/line to change any of the elements—service code, units/amount, provider (CHOICES invoices) or service date. The client/consumer cannot be changed.
- Invoice information for the individual consumer/line will appear.



- Service Code: To change the Service Code, click the list icon and select the correct service code from the dialog box. Click submit.


Invoice Information
Remove Invoice
Submit Invoice
Provider Riverside Adult Day Care
Invoice # RADC82006
Invoice Comments
Consumer
MARY ALTIERE – 875152 •
Service Code
"Enhanced ADS - 1/2 Day,
Comment about this line item:
0 of 512
Select Your Service Code
Submit
Only select One Service Code
Enhanced ADS - 1/2 Day, UOM:1/2 Day• S5101UA •@N
Enhanced ADS - 1/2 Day, UOM:1/2 Day• S5101UA •@N
ADS Transportation Round-Trip, UOM:Round Trip• T2025UAU5 •@N
Enhanced ADS - 15 min, UOM:15 Minutes• S5100UA •@N
Intensive ADS - 1 day, UOM:1 Day• S5102UAU3 •@N
Intensive ADS - 1/2 day, UOM:1/2 Day• S5101UAU2 •@N
Intensive ADS - 15 min, UOM:15 Minutes• S5100UAU1 •@N
ADS Transportation One Way Trip, UOM:1-Way Trip• T2003UA •@N
Enhanced ADS - 1 Day, UOM:1 Day• S5102UA •@N

- New Units/Amount: Enter a new unit(s) or amount.
- Service Date: Click the Calendar icon next to the date text box to display the calendar. Select the correct date. Click the forward/back icons to go forward/back a month or click the drop down arrow next to the month or year to change the month or year. Click Close to close the dialog box without changing the date.

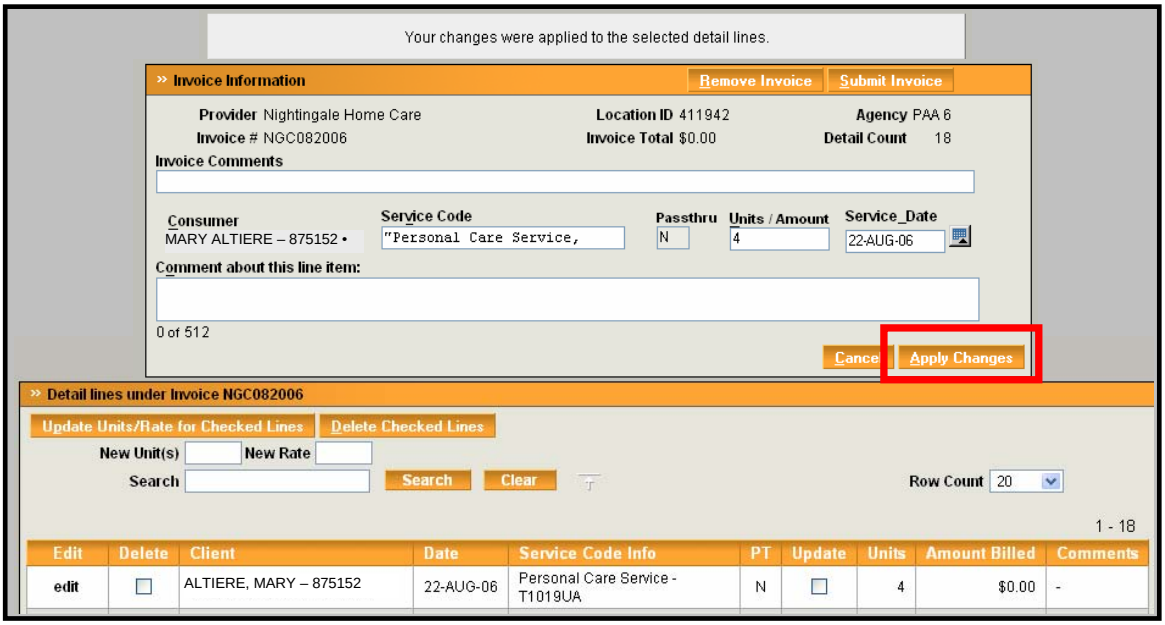


XIII. Edit an Invoice (con't.)

c) Edit Detail lines (con't.)

4. Edit an Individual Line (con'.t)

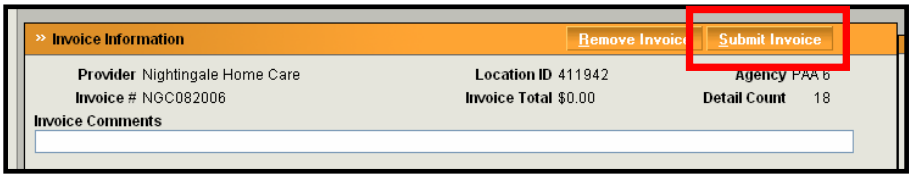
- Click Apply Changes to apply the updates.
- The system will return a confirmation: Your changes were applied to the selected detail line.
- Or click Cancel to cancel any changes/updates.



XIV. Submit Invoice

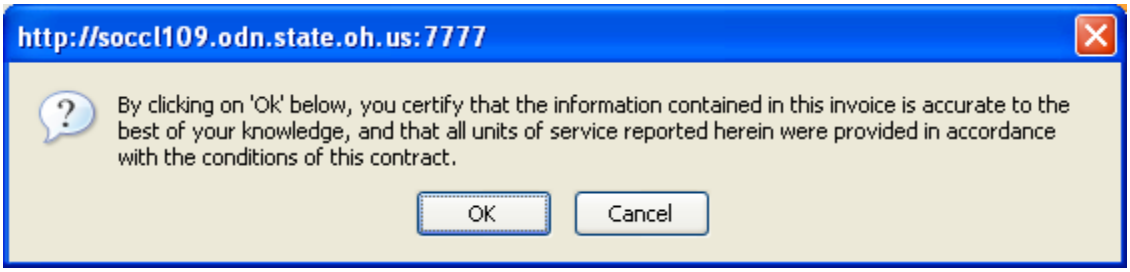
- User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location.

a) Once all charges are entered and edits/changes confirmed, click Submit Invoice



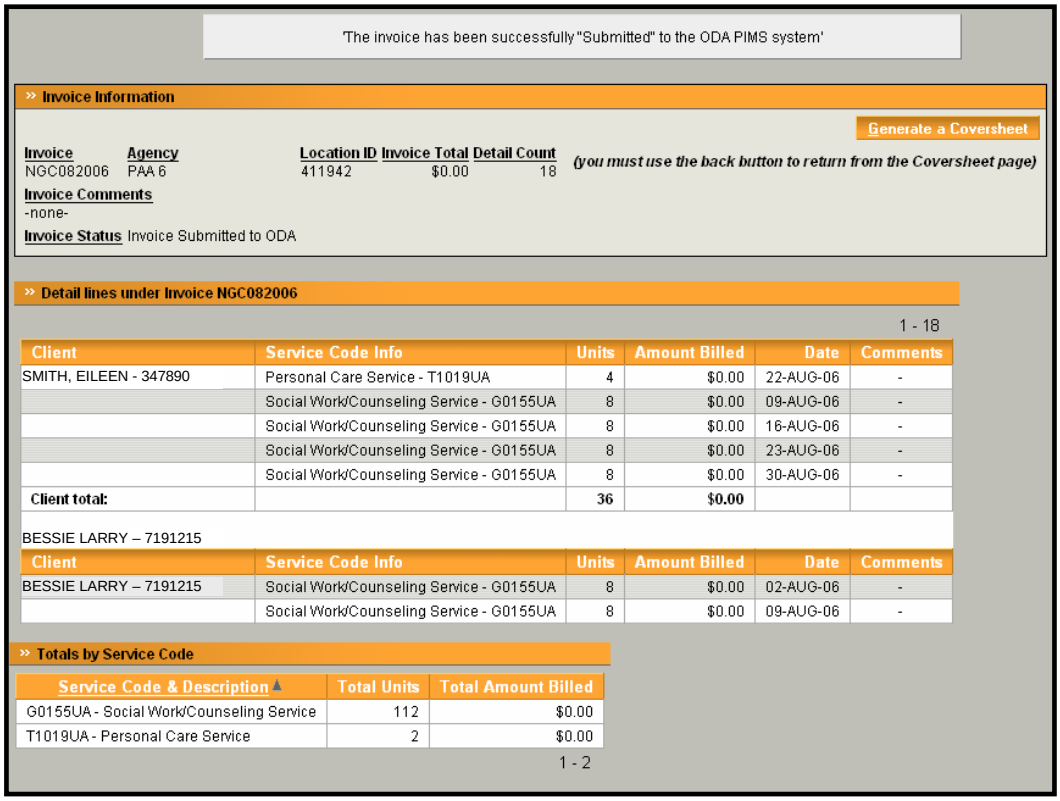
b) A dialog box will appear asking the user to, "…certify that the information contained in this invoice is accurate…"

- Click Ok to submit the invoice.
- Or click Cancel to cancel the submit invoice process.
- The user is brought back to the Invoice Information screen.


http://soccl109.odn.state.oh.us:7777
By clicking on 'Ok' below, you certify that the information contained in this invoice is accurate to the best of your knowledge, and that all units of service reported herein were provided in accordance with the conditions of this contract.
OK
Cancel

XIV. Submit Invoice (con't.)

c) The user will receive a confirmation from the system: The invoice has been successfully "Submitted" to the ODA PIMS system. The details of the invoice will be displayed.



'The invoice has been successfully "Submitted" to the ODA PIMS system'

» Invoice Information

Generate a Coversheet

Invoice	Agency	Location ID	Invoice Total	Detail Count
NGC082006	PAA 6	411942	$0.00	18

(you must use the back button to return from the Coversheet page)

Invoice Comments
-none-

Invoice Status Invoice Submitted to ODA

» Detail lines under Invoice NGC082006

1 - 18

Client	Service Code Info	Units	Amount Billed	Date	Comments
SMITH, EILEEN - 347890	Personal Care Service - T1019UA	4	$0.00	22-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	09-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	16-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	23-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	30-AUG-06	-
Client total:		**36**	**$0.00**		

BESSIE LARRY – 7191215

Client	Service Code Info	Units	Amount Billed	Date	Comments
BESSIE LARRY – 7191215	Social Work/Counseling Service - G0155UA	8	$0.00	02-AUG-06	-
	Social Work/Counseling Service - G0155UA	8	$0.00	09-AUG-06	-

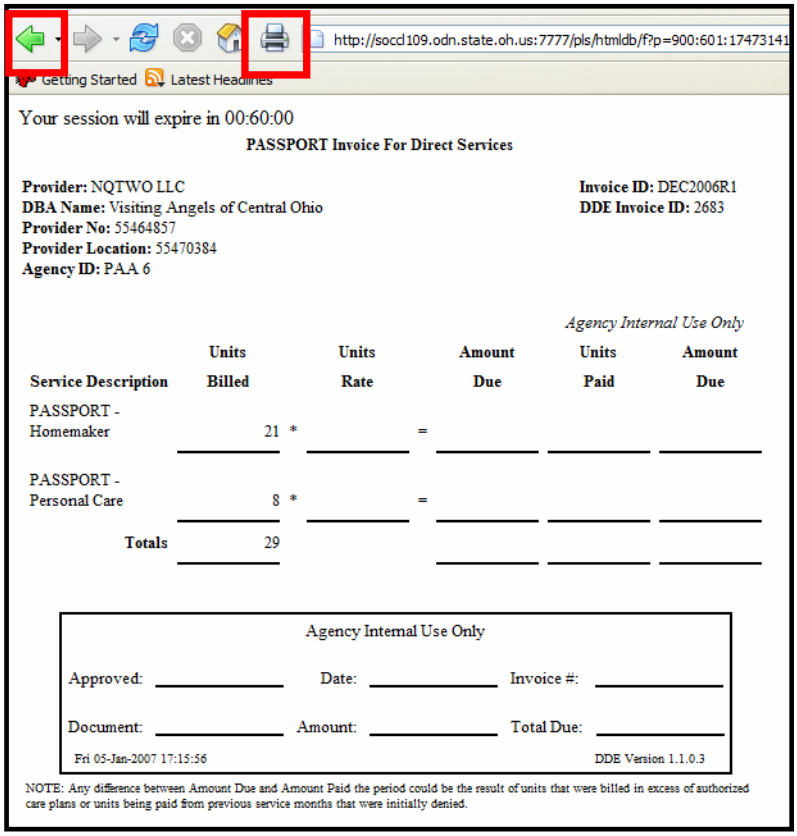
» Totals by Service Code

Service Code & Description	Total Units	Total Amount Billed
G0155UA - Social Work/Counseling Service	112	$0.00
T1019UA - Personal Care Service	2	$0.00

1 - 2

XV. Generate a Coversheet

a) Click Generate a Coversheet button to create the PASSPORT Invoice for Direct Services coversheet.
b) Click the browser's print button to send to printer.
c) Click the browser's back button to return to the submitted invoice details.



http://socd109.odn.state.oh.us:7777/pls/htmldb/f?p=900:601:17473141

Getting Started Latest Headlines

Your session will expire in 00:60:00

PASSPORT Invoice For Direct Services

Provider: NQTWO LLC
DBA Name: Visiting Angels of Central Ohio
Provider No: 55464857
Provider Location: 55470384
Agency ID: PAA 6

Invoice ID: DEC2006R1
DDE Invoice ID: 2683

Agency Internal Use Only

Service Description	Units Billed		Units Rate		Amount Due	Units Paid	Amount Due
PASSPORT - Homemaker	21	*		=			
PASSPORT - Personal Care	8	*		=			
Totals	29						

Agency Internal Use Only

Approved: _____ Date: _____ Invoice #: _____

Document: _____ Amount: _____ Total Due: _____

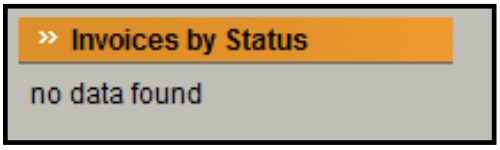
Fri 05-Jan-2007 17:15:56 DDE Version 1.1.0.3

NOTE: Any difference between Amount Due and Amount Paid the period could be the result of units that were billed in excess of authorized care plans or units being paid from previous service months that were initially denied.

XVI. Invoice Status Views

- Click the Invoices button to display the Invoice Status screen.
- User is logged in as a PAA Administrator, PAA Operator, Fiscal Intermediary or Provider Operator, or a PAA Administrator or a PAA Operator working on behalf of a provider location.
- The PAA Administrator and PAA Operator Roles can view all invoices and view Provider invoices by working on behalf of a provider location. The Provider Operator's view is limited to their Authorized Location(s). The Fiscal Intermediary's view is limited to CHOICES invoices.
- Invoice Views Available: Invoices Received by ODA, Invoices Submitted to ODA, Invoices Under Review, Invoices Under Review with Remittance Advice, Invoices In Progress, Invoices with Remittance Advice and Rejected Invoices
- Click on a column heading to sort data in ascending or descending order.
- Click an invoice number to view the details or to finish an invoice in progress.

a) Invoices by Status score card
   - The Invoices by Status scorecard is displayed at the bottom of every Invoice View. If no invoices are found, then "no data found" will be displayed.
   - The table will list the status of all invoices for the PAA Administrator and PAA Operator Roles.
   - The table for the Provider Operator Role will list the status of all invoices for their Authorized Location(s).
   - The Fiscal Intermediary's view is limited to CHOICES invoices.



Example: No data found

» Invoices by Status

Type	Invoice Status	Count
PIMS	Invoices Received by ODA	2
PIMS	Invoices Under Review with Remittance Advice	2

Example: Provider Operator Role

» Invoices by Status

Type	Invoice Status	Count
PIMS	Invoices in Progress	47
PIMS	Invoices Submitted to ODA	42
PIMS	Invoices Received by ODA	49
PIMS	Invoices Under Review	5
PIMS	Invoices with Remittance Advice	1
PIMS	Rejected Invoices	6
Choices	Invoices in Progress	2
Choices	Invoices Submitted to ODA	1
Choices	Invoices Received by ODA	5
Choices	Invoices with Remittance Advice	3

Example: PAA Administrator and PAA Operator Roles

» Invoices by Status

Type	Invoice Status	Count
Choices	Invoices in Progress	2
Choices	Invoices Submitted to ODA	1
Choices	Invoices with Remittance Advice	3
Choices	Invoices Received by ODA	5

Example: Fiscal Intermediary Role

XVI. Invoice Status Views (con't.)

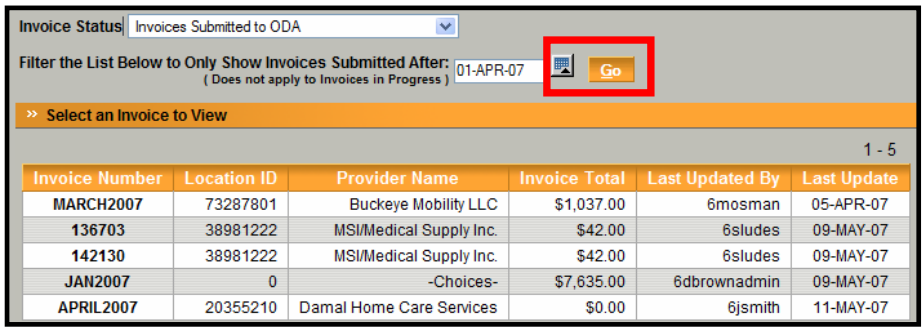
b) Invoice Views Available

- **Invoices Received by ODA** – Displays invoices received by ODA PIMS/PASSPORT system.
- **Invoices Submitted to ODA** – Displays invoices sent to ODA PIMS/PASSPORT, but not acknowledged as received.
- **Invoices Under Review** – Displays invoice under review by an ODA agent or a process. No remittance available.
- **Invoices Under Review with Remittance Advice** – Displays invoices under review by an ODA agent or a process. Remittance advice available for a portion of the invoice.
- **Invoices In Progress** – Displays invoices in progress–not submitted to ODA. The user is able to select an invoice and make edits and changes. Invoices stay in progress until submitted.
- **Invoices with Remittance Advice** – Displays invoices paid with remittance advice available in DDE. The data is generated from the remittance advice report in PIMS.
- **Rejected Invoices** – Displays invoices rejected in full by case manager.

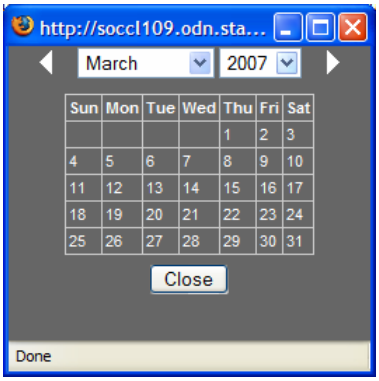
c) Filter the List

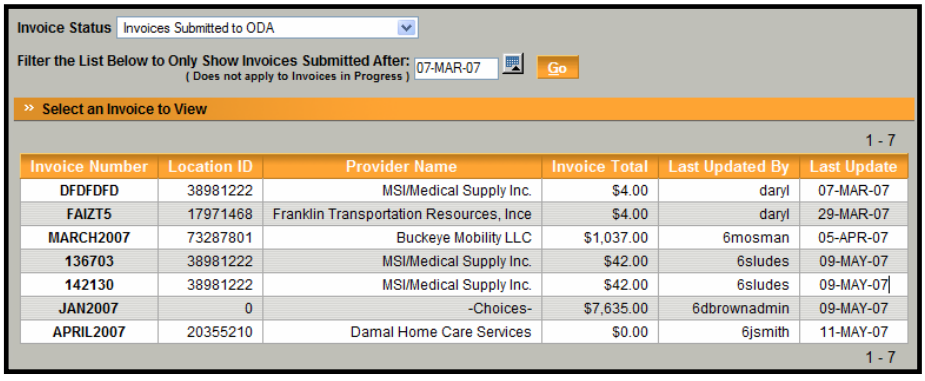
- The "Filter the List Below to Only Show Invoices Submitted After" a specified date is available with all Invoice Views except Invoices in Progress.

1. First, select which Invoice Status to be viewed.
2. To filter the list, click the Calendar icon to display the calendar.
3. Select a date. Click the forward/back icons to go forward/back a month or click the drop down arrow next to the month or year to change the month or year. Click Close to close the dialog box without changing the date.
4. Click Go. A filtered list will display based on the date selected.


Invoice Status
Invoices Submitted to ODA
Filter the List Below to Only Show Invoices Submitted After:
(Does not apply to Invoices in Progress)
01-APR-07
Go
Select an Invoice to View
1 - 5
Invoice Number | Location ID | Provider Name | Invoice Total | Last Updated By | Last Update
MARCH2007 | 73287801 | Buckeye Mobility LLC | $1,037.00 | 6mosman | 05-APR-07
136703 | 38981222 | MSI/Medical Supply Inc. | $42.00 | 6sludes | 09-MAY-07
142130 | 38981222 | MSI/Medical Supply Inc. | $42.00 | 6sludes | 09-MAY-07
JAN2007 | 0 | -Choices- | $7,635.00 | 6dbrownadmin | 09-MAY-07
APRIL2007 | 20355210 | Damal Home Care Services | $0.00 | 6jsmith | 11-MAY-07

Before Filter




Invoice Status
Invoices Submitted to ODA
Filter the List Below to Only Show Invoices Submitted After:
(Does not apply to Invoices in Progress)
07-MAR-07
Go
Select an Invoice to View
1 - 7
Invoice Number | Location ID | Provider Name | Invoice Total | Last Updated By | Last Update
DFDFDFD | 38981222 | MSI/Medical Supply Inc. | $4.00 | daryl | 07-MAR-07
FAIZT5 | 17971468 | Franklin Transportation Resources, Ince | $4.00 | daryl | 29-MAR-07
MARCH2007 | 73287801 | Buckeye Mobility LLC | $1,037.00 | 6mosman | 05-APR-07
136703 | 38981222 | MSI/Medical Supply Inc. | $42.00 | 6sludes | 09-MAY-07
142130 | 38981222 | MSI/Medical Supply Inc. | $42.00 | 6sludes | 09-MAY-07
JAN2007 | 0 | -Choices- | $7,635.00 | 6dbrownadmin | 09-MAY-07
APRIL2007 | 20355210 | Damal Home Care Services | $0.00 | 6jsmith | 11-MAY-07
1 - 7

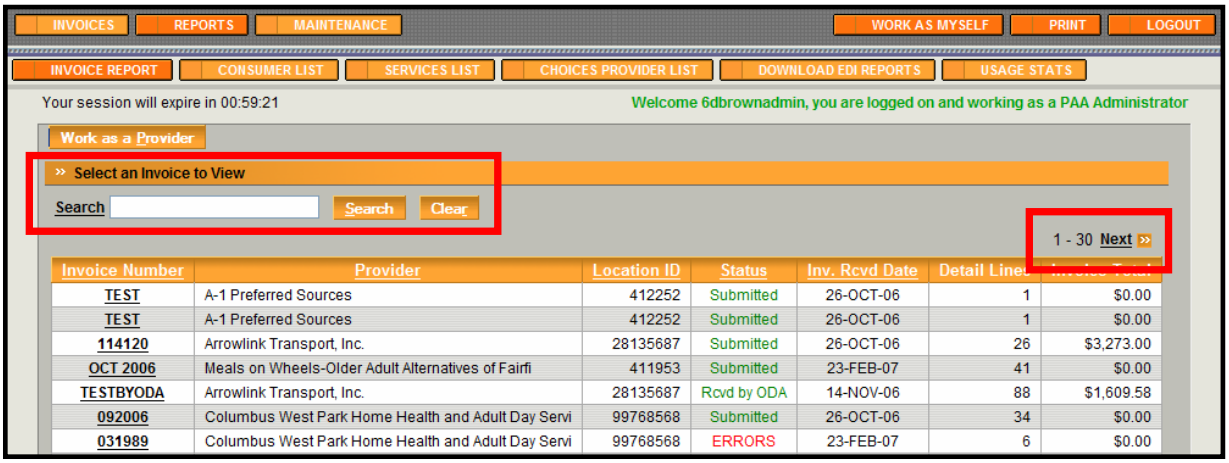
After Filter

XVII. Reports

- The PAA Administrator and PAA Operator Roles can display all invoices for their site, including CHOICES, and must work on behalf of a provider location to display the Provider's consumer list, service list and to download EDI reports. The PAA Administrator can view usage stats.
- The Provider Operator Role display is limited to their authorized location(s).
- The Provider Operator Reports Only Role display is limited to Download EDI Reports.
- The Fiscal Intermediary Role display is limited to CHOICES reports.

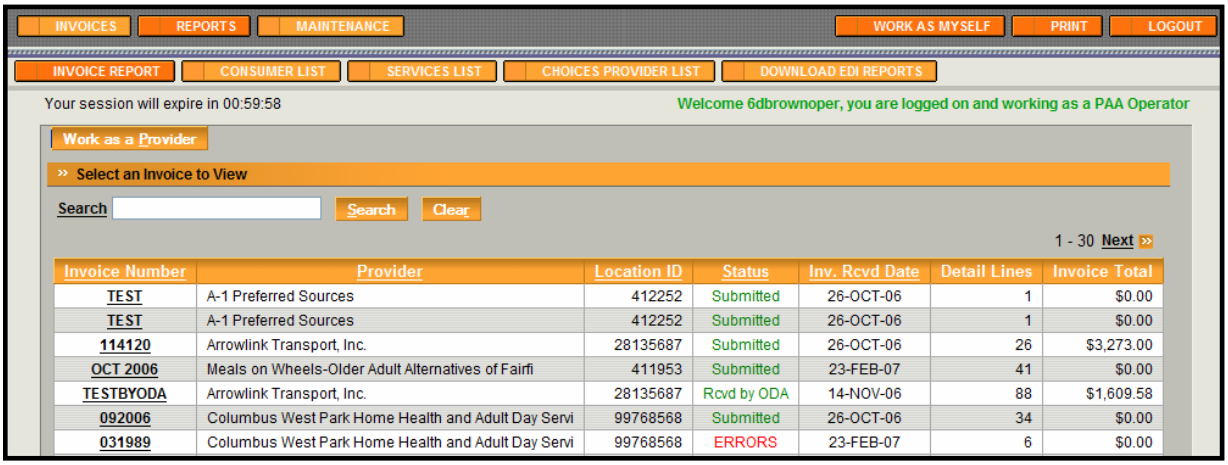
a) Invoice Report
- PAA Administrator, PAA Operator, Provider Operator and Fiscal Intermediary Roles.
- Click the Reports button to display Invoice Report.
- Click a column heading to sort data in ascending or descending order.
- The first 30 rows will be displayed. Click Next to see additional data or click the drop down arrow to select more rows to be displayed. Click the previous button to go back 30 rows.
- To Search for an Invoice, enter a search string in the Search text box and click Search. Click Reset to display the entire list and clear the text box. Invoice Number, Agency, Location ID, Status and Received Date are searched.

PAA Administrator Role



Invoice Number	Provider	Location ID	Status	Inv. Rcvd Date	Detail Lines	Invoice Total
TEST	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
TEST	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
114120	Arrowlink Transport, Inc.	28135687	Submitted	26-OCT-06	26	$3,273.00
OCT 2006	Meals on Wheels-Older Adult Alternatives of Fairfi	411953	Submitted	23-FEB-07	41	$0.00
TESTBYODA	Arrowlink Transport, Inc.	28135687	Rcvd by ODA	14-NOV-06	88	$1,609.58
092006	Columbus West Park Home Health and Adult Day Servi	99768568	Submitted	26-OCT-06	34	$0.00
031989	Columbus West Park Home Health and Adult Day Servi	99768568	ERRORS	23-FEB-07	6	$0.00

PAA Operator Role

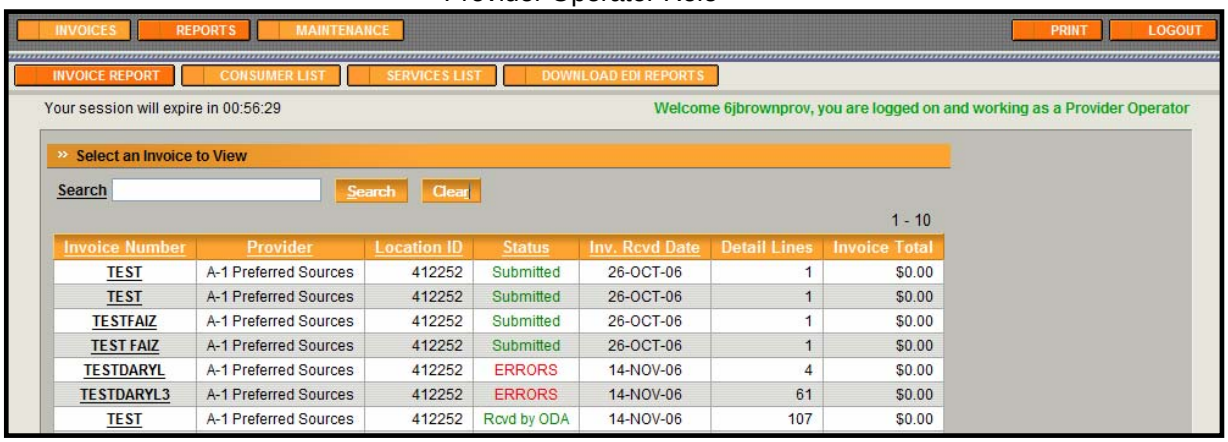


Invoice Number	Provider	Location ID	Status	Inv. Rcvd Date	Detail Lines	Invoice Total
TEST	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
TEST	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
114120	Arrowlink Transport, Inc.	28135687	Submitted	26-OCT-06	26	$3,273.00
OCT 2006	Meals on Wheels-Older Adult Alternatives of Fairfi	411953	Submitted	23-FEB-07	41	$0.00
TESTBYODA	Arrowlink Transport, Inc.	28135687	Rcvd by ODA	14-NOV-06	88	$1,609.58
092006	Columbus West Park Home Health and Adult Day Servi	99768568	Submitted	26-OCT-06	34	$0.00
031989	Columbus West Park Home Health and Adult Day Servi	99768568	ERRORS	23-FEB-07	6	$0.00

XVII. Reports (con't.)

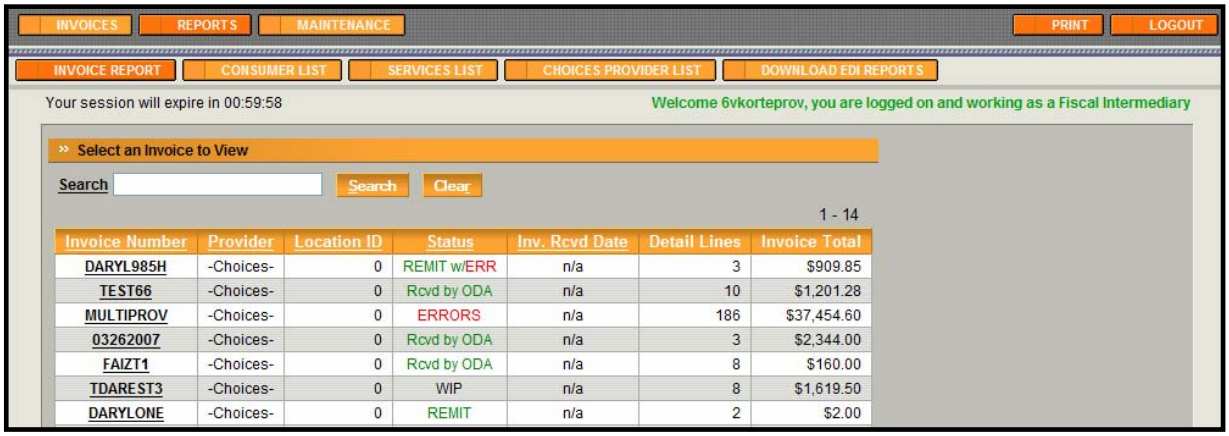
a). Invoice Report (con't.)

Provider Operator Role



Invoice Number	Provider	Location ID	Status	Inv. Rcvd Date	Detail Lines	Invoice Total
TEST	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
TEST	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
TESTFAIZ	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
TEST FAIZ	A-1 Preferred Sources	412252	Submitted	26-OCT-06	1	$0.00
TESTDARYL	A-1 Preferred Sources	412252	ERRORS	14-NOV-06	4	$0.00
TESTDARYL3	A-1 Preferred Sources	412252	ERRORS	14-NOV-06	61	$0.00
TEST	A-1 Preferred Sources	412252	Rcvd by ODA	14-NOV-06	107	$0.00

Fiscal Intermediary Role



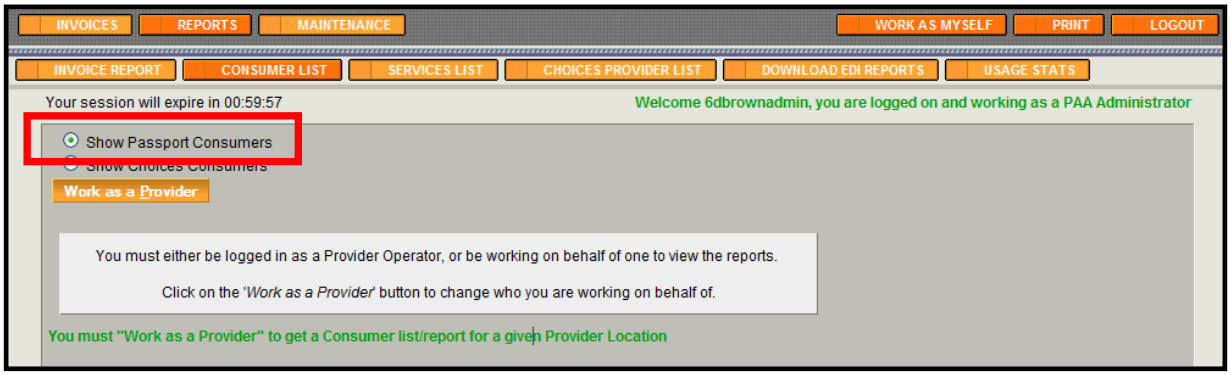
Invoice Number	Provider	Location ID	Status	Inv. Rcvd Date	Detail Lines	Invoice Total
DARYL985H	-Choices-	0	REMIT w/ERR	n/a	3	$909.85
TEST66	-Choices-	0	Rcvd by ODA	n/a	10	$1,201.28
MULTIPROV	-Choices-	0	ERRORS	n/a	186	$37,454.60
03262007	-Choices-	0	Rcvd by ODA	n/a	3	$2,344.00
FAIZT1	-Choices-	0	Rcvd by ODA	n/a	8	$160.00
TDAREST3	-Choices-	0	WIP	n/a	8	$1,619.50
DARYLONE	-Choices-	0	REMIT	n/a	2	$2.00

XVII. Reports (con't.)

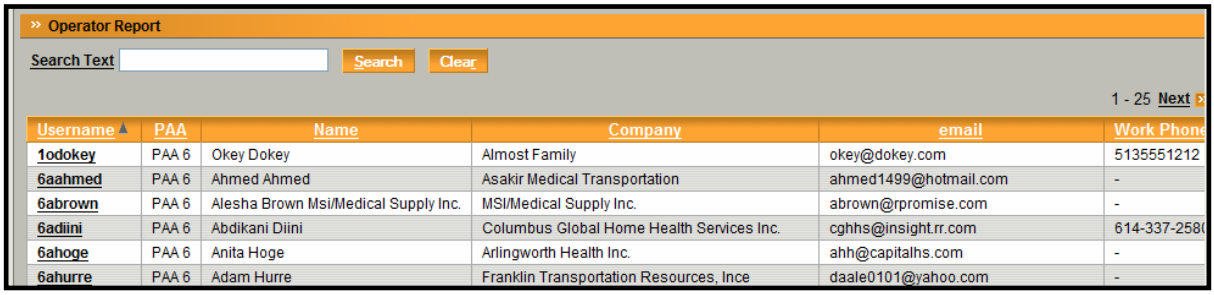
b) Consumer List

- PAA Administrator, PAA Operator, Provider Operator and Fiscal Intermediary Roles.
- The user must either be logged in as Provider Operator, Fiscal Intermediary or be working on behalf of a Provider Operator to view the Consumer List.
- Click Reports then the Consumer List button.

PAA Administrator or PAA Operator Role – PASSPORT Consumers

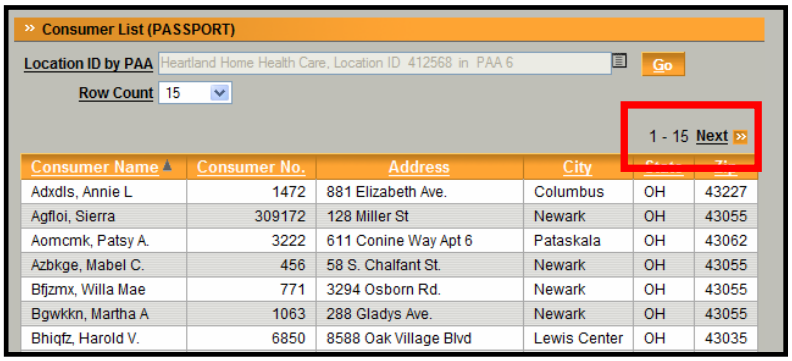

INVOICES
REPORTS
MAINTENANCE
WORK AS MYSELF
PRINT
LOGOUT
INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
USAGE STATS
Your session will expire in 00:59:57
Welcome 6dbrownadmin, you are logged on and working as a PAA Administrator
Show Passport Consumers
Work as a Provider
You must either be logged in as a Provider Operator, or be working on behalf of one to view the reports.
Click on the 'Work as a Provider' button to change who you are working on behalf of.
You must "Work as a Provider" to get a Consumer list/report for a given Provider Location

- To Show Passport Consumers the user must either be logged in as a Provider Operator or be working on behalf of one to view the reports. Click on the 'Work as a Provider' button to change who you are working on behalf of. Select a Provider from the list.



Username	PAA	Name	Company	email	Work Phone
1odokey	PAA 6	Okey Dokey	Almost Family	okey@dokey.com	5135551212
6aahmed	PAA 6	Ahmed Ahmed	Asakir Medical Transportation	ahmed1499@hotmail.com	-
6abrown	PAA 6	Alesha Brown Msi/Medical Supply Inc.	MSI/Medical Supply Inc.	abrown@rpromise.com	-
6adiini	PAA 6	Abdikani Diini	Columbus Global Home Health Services Inc.	cghhs@insight.rr.com	614-337-258(
6ahoge	PAA 6	Anita Hoge	Arlingworth Health Inc.	ahh@capitalhs.com	-
6ahurre	PAA 6	Adam Hurre	Franklin Transportation Resources, Ince	daale0101@yahoo.com	-

- A report of PASSPORT Consumers specific to the location ID will display. The Consumer list will display Consumer Name, Consumer Number, Address, City, State and Zip. Click a column heading to sort data in ascending or descending order.
- Click Next to see additional data or click the drop down arrow next to row(s) X-XX to select more rows to be displayed. Click the Previous button to go back.



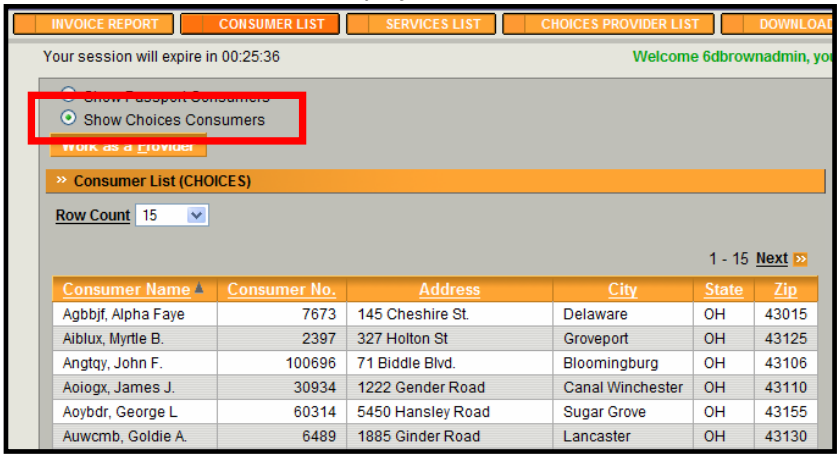
Consumer Name	Consumer No.	Address	City		
Adxdls, Annie L	1472	881 Elizabeth Ave.	Columbus	OH	43227
Agfloi, Sierra	309172	128 Miller St	Newark	OH	43055
Aomcmk, Patsy A.	3222	611 Conine Way Apt 6	Pataskala	OH	43062
Azbkge, Mabel C.	456	58 S. Chalfant St.	Newark	OH	43055
Bfjzmx, Willa Mae	771	3294 Osborn Rd.	Newark	OH	43055
Bgwkkn, Martha A	1063	288 Gladys Ave.	Newark	OH	43055
Bhiqfz, Harold V.	6850	8588 Oak Village Blvd	Lewis Center	OH	43035

XVII. Reports (con't.)

b). Consumer List (con't.)

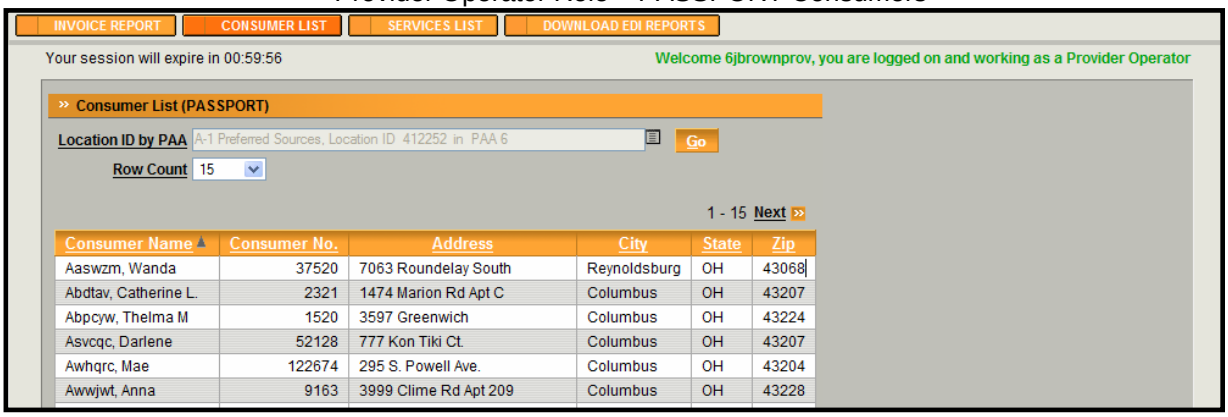
PAA Administrator or PAA Operator Role – CHOICES Consumers

- Select Show Choices Consumers to display CHOICES consumers.



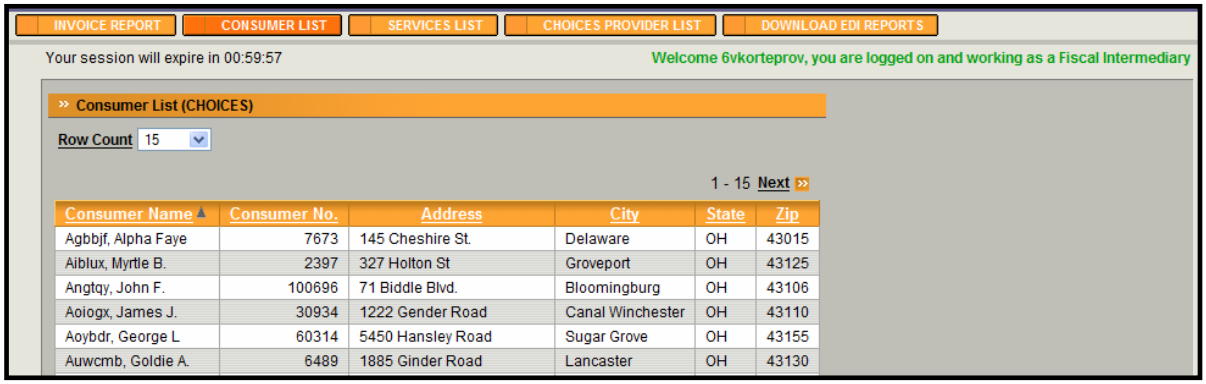
Consumer Name	Consumer No.	Address	City	State	Zip
Agbbjf, Alpha Faye	7673	145 Cheshire St.	Delaware	OH	43015
Aiblux, Myrtle B.	2397	327 Holton St	Groveport	OH	43125
Angtqy, John F.	100696	71 Biddle Blvd.	Bloomingburg	OH	43106
Aoiogx, James J.	30934	1222 Gender Road	Canal Winchester	OH	43110
Aoybdr, George L	60314	5450 Hansley Road	Sugar Grove	OH	43155
Auwcmb, Goldie A.	6489	1885 Ginder Road	Lancaster	OH	43130

Provider Operator Role – PASSPORT Consumers


INVOICE REPORT
CONSUMER LIST
SERVICES LIST
DOWNLOAD EDI REPORTS
Your session will expire in 00:59:56
Welcome 6jbrownprov, you are logged on and working as a Provider Operator
Consumer List (PASSPORT)
Location ID by PAA A-1 Preferred Sources, Location ID 412252 in PAA 6
Go
Row Count 15
1 - 15 Next

Consumer Name	Consumer No.	Address	City	State	Zip
Aaswzm, Wanda	37520	7063 Roundelay South	Reynoldsburg	OH	43068
Abdtav, Catherine L.	2321	1474 Marion Rd Apt C	Columbus	OH	43207
Abpcyw, Thelma M	1520	3597 Greenwich	Columbus	OH	43224
Asvcqc, Darlene	52128	777 Kon Tiki Ct.	Columbus	OH	43207
Awhqrc, Mae	122674	295 S. Powell Ave.	Columbus	OH	43204
Awwjwt, Anna	9163	3999 Clime Rd Apt 209	Columbus	OH	43228

Fiscal Intermediary Role – CHOICES Consumers

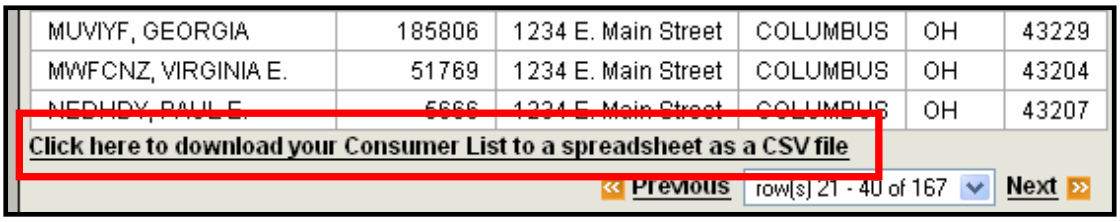

INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
Your session will expire in 00:59:57
Welcome 6vkorteprov, you are logged on and working as a Fiscal Intermediary
Consumer List (CHOICES)
Row Count 15
1 - 15 Next

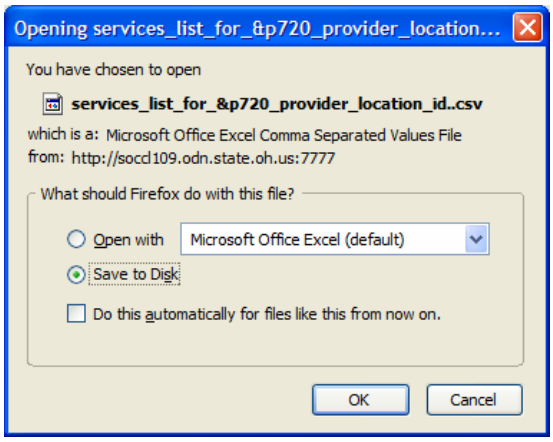
Consumer Name	Consumer No.	Address	City	State	Zip
Agbbjf, Alpha Faye	7673	145 Cheshire St.	Delaware	OH	43015
Aiblux, Myrtle B.	2397	327 Holton St	Groveport	OH	43125
Angtqy, John F.	100696	71 Biddle Blvd.	Bloomingburg	OH	43106
Aoiogx, James J.	30934	1222 Gender Road	Canal Winchester	OH	43110
Aoybdr, George L	60314	5450 Hansley Road	Sugar Grove	OH	43155
Auwcmb, Goldie A.	6489	1885 Ginder Road	Lancaster	OH	43130

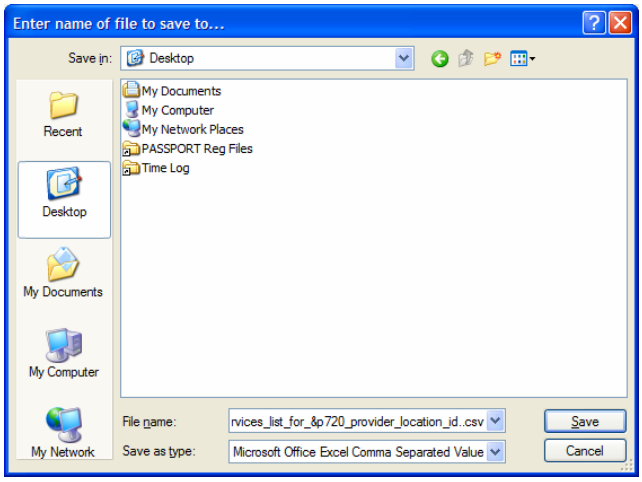
XVII. Reports (con't.)

b). Consumer List (con't.)

- To download the report, click "Click here to download your Consumer List to a spreadsheet as a CSV file." CSV = Comma Separated Values.
- Follow the browser's download instructions to open with Microsoft Excel or save to Disk.


MUVIYF, GEORGIA 185806 1234 E. Main Street COLUMBUS OH 43229
MWFCNZ, VIRGINIA E. 51769 1234 E. Main Street COLUMBUS OH 43204
OH 43207
Click here to download your Consumer List to a spreadsheet as a CSV file
Previous
row(s) 21 - 40 of 167
Next

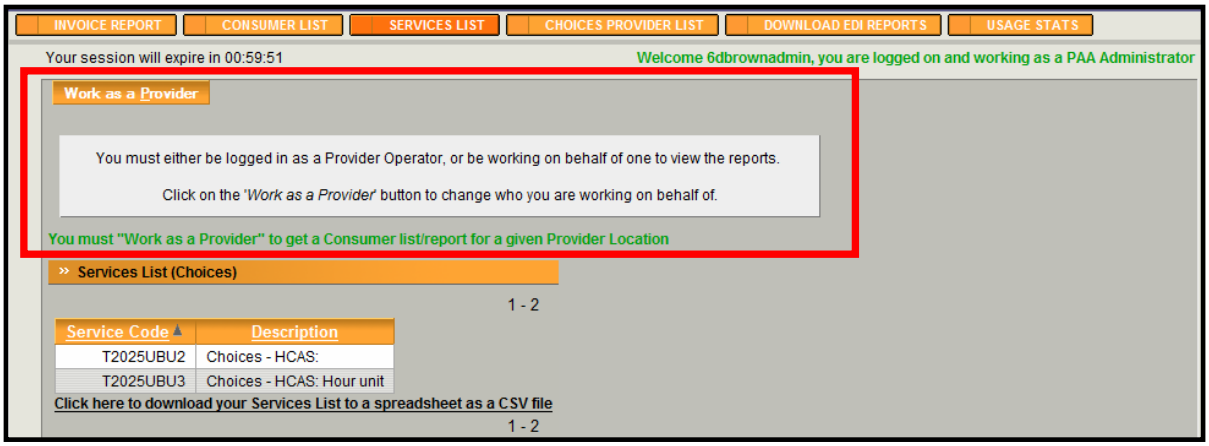

Opening services_list_for_&p720_provider_location...
You have chosen to open
services_list_for_&p720_provider_location_id..csv
which is a: Microsoft Office Excel Comma Separated Values File
from: http://soccl109.odn.state.oh.us:7777
What should Firefox do with this file?
Open with
Microsoft Office Excel (default)
Save to Disk
Do this automatically for files like this from now on.
OK
Cancel



c) Services List

- PAA Administrator, PAA Operator, Provider Operator and Fiscal Intermediary Roles.
- The user must either be logged in as Provider Operator, Fiscal Intermediary or be working on behalf of a Provider Operator to view the Services List.
- Click Reports then the Services List button.

PAA Administrator or PAA Operator Role – PASSPORT Services

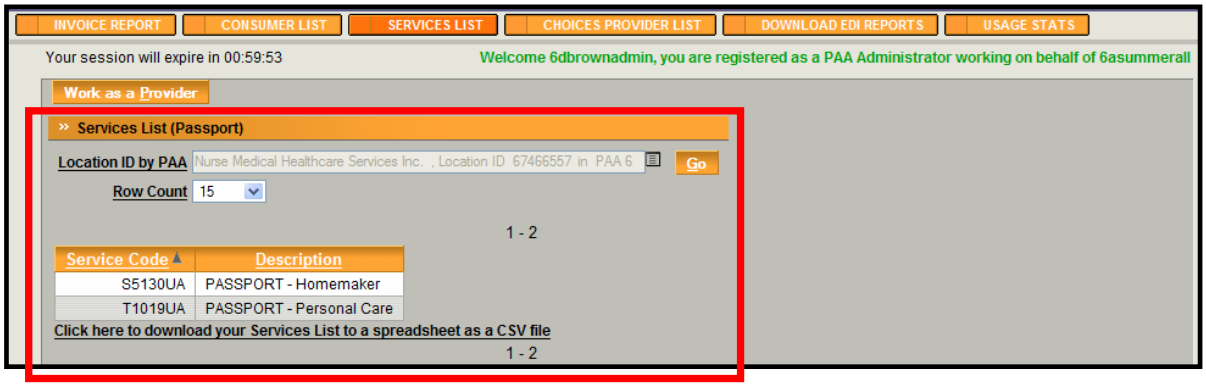

INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
USAGE STATS
Your session will expire in 00:59:51
Welcome 6dbrownadmin, you are logged on and working as a PAA Administrator
Work as a Provider
You must either be logged in as a Provider Operator, or be working on behalf of one to view the reports.
Click on the 'Work as a Provider' button to change who you are working on behalf of.
You must "Work as a Provider" to get a Consumer list/report for a given Provider Location
Services List (Choices)
1 - 2
Service Code
Description
T2025UBU2
Choices - HCAS:
T2025UBU3
Choices - HCAS: Hour unit
Click here to download your Services List to a spreadsheet as a CSV file
1 - 2

- To display PASSPORT Services the user must either be logged in as a Provider Operator or be working on behalf of one to view the reports. Click on the 'Work as a Provider' button to change who you are working on behalf of. Select a Provider from the list.

XVII. Reports (con't.)

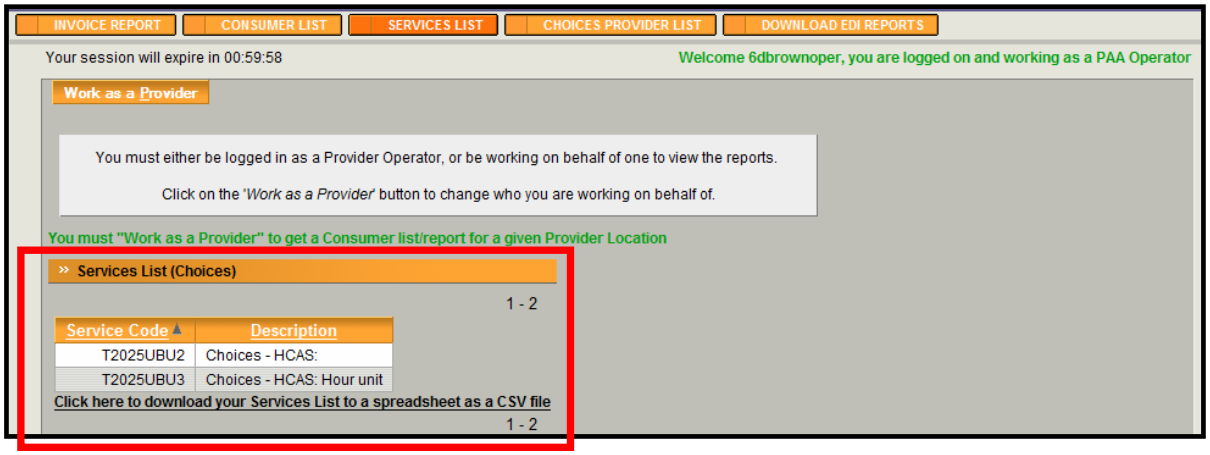
c) Services List (con't.)

- A report of PASSPORT Services specific to the location ID will display. Displayed will be the Service Code and Description. Click a column heading to sort data in ascending or descending order.
- If necessary, click Next to see additional data or click the drop down arrow next to row(s) X-XX to select more rows to be displayed. Click the Previous button to go back.



Provider Operator Role – PASSPORT Services

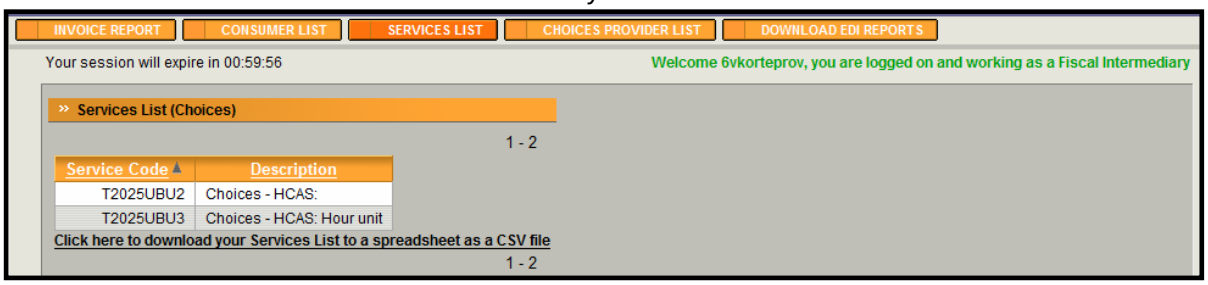
PAA Administrator or PAA Operator Role – CHOICES Services


INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
Your session will expire in 00:59:58
Welcome 6dbrownoper, you are logged on and working as a PAA Operator
Work as a Provider
You must either be logged in as a Provider Operator, or be working on behalf of one to view the reports.
Click on the 'Work as a Provider' button to change who you are working on behalf of.
You must "Work as a Provider" to get a Consumer list/report for a given Provider Location
Services List (Choices)
1 - 2
Service Code
Description
T2025UBU2
Choices - HCAS:
T2025UBU3
Choices - HCAS: Hour unit
Click here to download your Services List to a spreadsheet as a CSV file
1 - 2

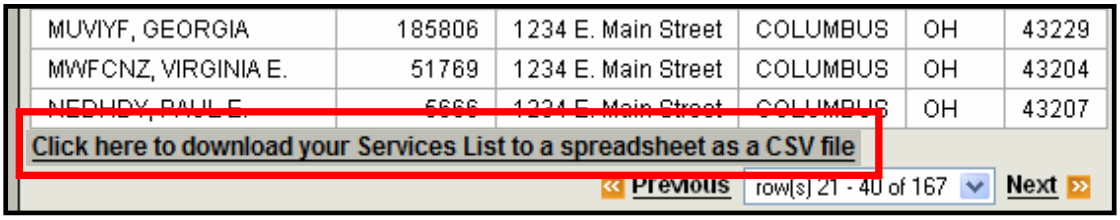
XVII. Reports (con't.)

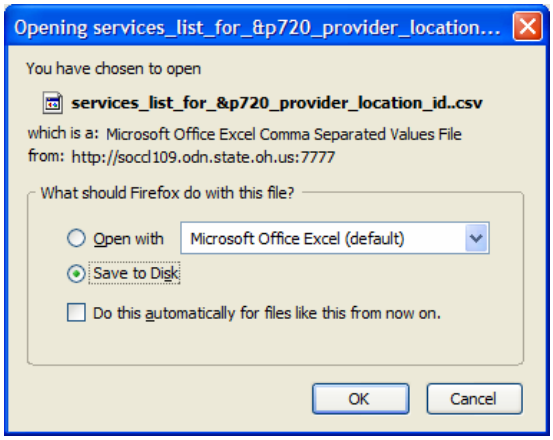
c) Services List (con't.)

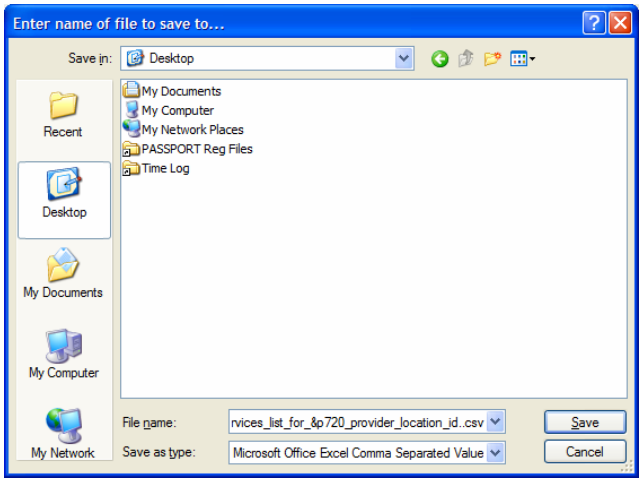
Fiscal Intermediary Role – CHOICES Services



- To download the report, click "Click here to download your Services List to a spreadsheet as a CSV file." CSV = Comma Separated Values.
- Follow the browser's download instructions to open with Microsoft Excel or save to Disk.


MUVIYF, GEORGIA 185806 1234 E. Main Street COLUMBUS OH 43229
MWFCNZ, VIRGINIA E. 51769 1234 E. Main Street COLUMBUS OH 43204
OH 43207
Click here to download your Services List to a spreadsheet as a CSV file
Previous
row[s] 21 - 40 of 167
Next


Opening services_list_for_&p720_provider_location...
You have chosen to open
services_list_for_&p720_provider_location_id..csv
which is a: Microsoft Office Excel Comma Separated Values File
from: http://soccl109.odn.state.oh.us:7777
What should Firefox do with this file?
Open with
Microsoft Office Excel (default)
Save to Disk
Do this automatically for files like this from now on.
OK
Cancel



XVII. Reports (con't.)

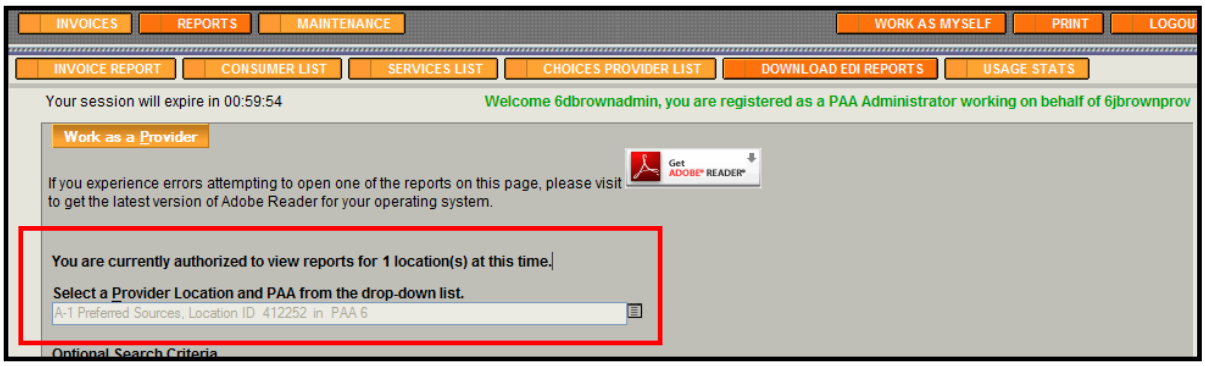
d) Download EDI Reports

- The PAA Administrator and PAA Operator Roles must work on behalf of a provider location to display the information on this page.
- The Provider Operator and the Provider Operator Report's Only Roles display is limited to their authorized location(s).
- The Fiscal Intermediary Role displays CHOICES reports.
- A table of reports available for download (for the last 90 days) will display.
- Reports Available for Download
  - **Activity Summary** – Status of report of invoice submitted. Naming convention AS + invoice number entered in Invoice Entry section. Ex: ASBest082006.pdf
  - **Claims Acknowledgment** – Report of rejected claims. Naming convention CA + invoice number entered in Invoice Entry section. Ex: CABest082006.pdf
  - **Remittance Advice** – Remittance Advice reported generated from PIMS.
  - **Reports by Type (last 90 days)** – Displays a scorecard of reports available for download for the last 90 days.
- Click Reports then the Download EDI Reports button.

PAA Administrator or PAA Operator Roles

INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
USAGE STATS
Your session will expire in 00:59:57
Welcome 4cbrickner, you are logged on and working as a PAA Administrator
Work as a Provider
If you experience errors attempting to open one of the reports on this page, please visit to get the latest version of Adobe Reader for your operating system.
Get ADOBE READER
You must either be logged in as a Provider Operator, or be working on behalf of one to view the reports.
Click on the 'Work as a Provider' button to change who you are working on behalf of.
You are currently authorized to view reports for 0 location(s) at this time.
Activity Summary
no data found
Remittance Advice
no data found If more than one invoice was submitted in a billing cycle, Remittance Advice for all submitted invoices will be listed in one RA file.
Reports by Type (last 90 days)
Report Type
Count
Activity Summary 0
Claim Acknowledgment 0
Remittance Advice 0
report total: 0

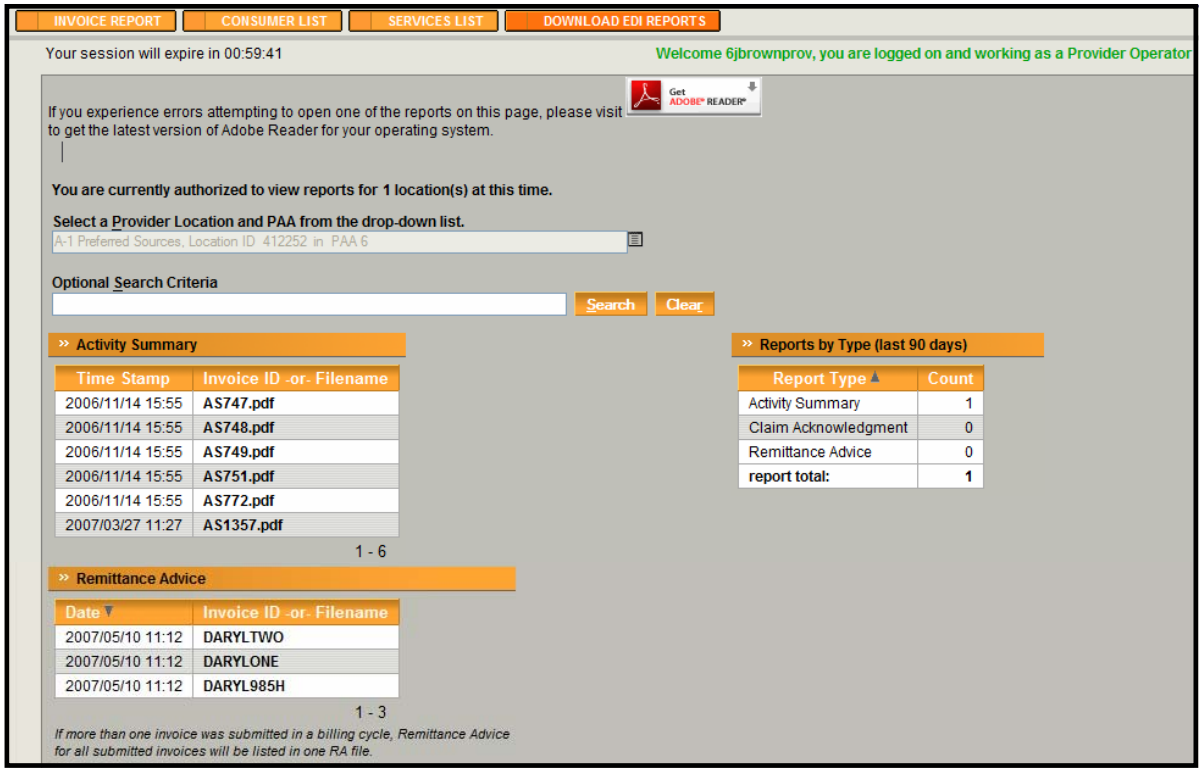
- To display PASSPORT Services the user must either be logged in as a Provider Operator or be working on behalf of one to view the reports. Click on the 'Work as a Provider' button to change who you are working on behalf of. Select a Provider from the list.


INVOICES
REPORTS
MAINTENANCE
WORK AS MYSELF
PRINT
LOGOU
INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
USAGE STATS
Your session will expire in 00:59:54
Welcome 6dbrownadmin, you are registered as a PAA Administrator working on behalf of 6jbrownprov
Work as a Provider
If you experience errors attempting to open one of the reports on this page, please visit to get the latest version of Adobe Reader for your operating system.
Get ADOBE READER
You are currently authorized to view reports for 1 location(s) at this time.
Select a Provider Location and PAA from the drop-down list.
A-1 Preferred Sources, Location ID 412252 in PAA 6
Optional Search Criteria

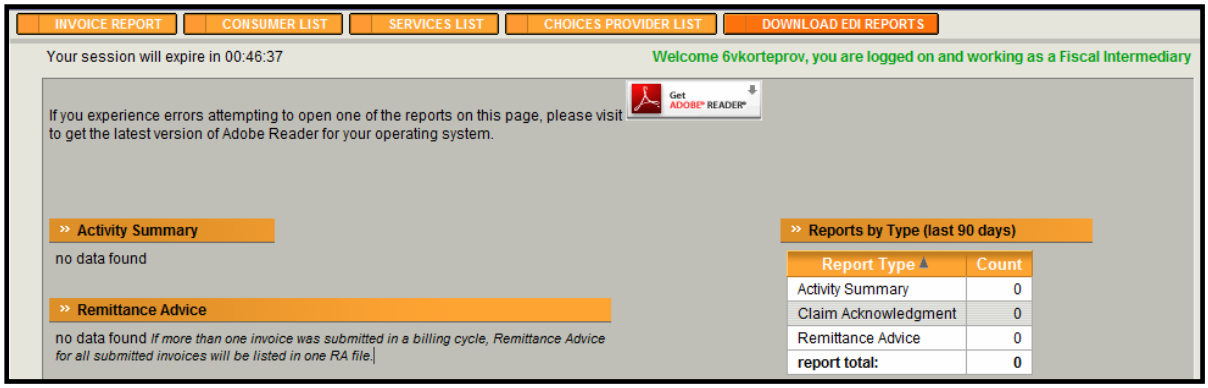
XVII. Reports (con't.)

d). Download EDI Reports (con't.)

Provider Operator & Provider Operator Reports Only Role


INVOICE REPORT
CONSUMER LIST
SERVICES LIST
DOWNLOAD EDI REPORTS
Your session will expire in 00:59:41
Welcome 6jbrownprov, you are logged on and working as a Provider Operator
If you experience errors attempting to open one of the reports on this page, please visit to get the latest version of Adobe Reader for your operating system.
You are currently authorized to view reports for 1 location(s) at this time.
Select a Provider Location and PAA from the drop-down list.
A-1 Preferred Sources, Location ID 412252 in PAA 6
Optional Search Criteria
Search
Clear
» Activity Summary
Time Stamp
Invoice ID -or- Filename
2006/11/14 15:55 AS747.pdf
2006/11/14 15:55 AS748.pdf
2006/11/14 15:55 AS749.pdf
2006/11/14 15:55 AS751.pdf
2006/11/14 15:55 AS772.pdf
2007/03/27 11:27 AS1357.pdf
1 - 6
» Reports by Type (last 90 days)
Report Type
Count
Activity Summary 1
Claim Acknowledgment 0
Remittance Advice 0
report total: 1
» Remittance Advice
Date
Invoice ID -or- Filename
2007/05/10 11:12 DARYLTWO
2007/05/10 11:12 DARYLONE
2007/05/10 11:12 DARYL985H
1 - 3
If more than one invoice was submitted in a billing cycle, Remittance Advice for all submitted invoices will be listed in one RA file.

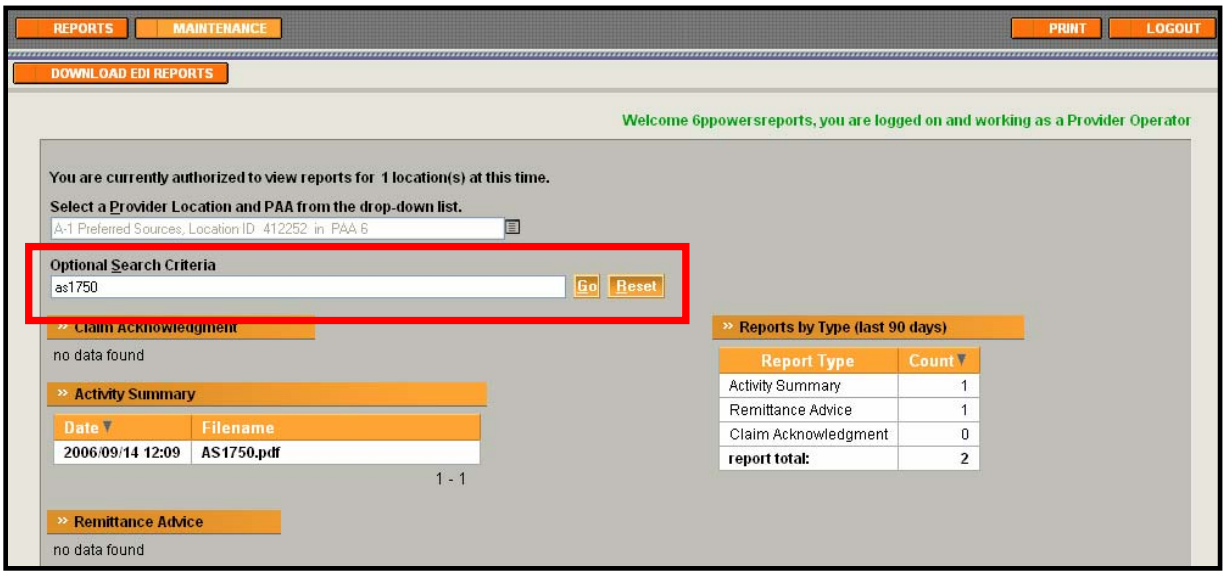
Fiscal Intermediary


INVOICE REPORT
CONSUMER LIST
SERVICES LIST
CHOICES PROVIDER LIST
DOWNLOAD EDI REPORTS
Your session will expire in 00:46:37
Welcome 6vkorteprov, you are logged on and working as a Fiscal Intermediary
If you experience errors attempting to open one of the reports on this page, please visit to get the latest version of Adobe Reader for your operating system.
» Activity Summary
no data found
» Remittance Advice
no data found If more than one invoice was submitted in a billing cycle, Remittance Advice for all submitted invoices will be listed in one RA file.
» Reports by Type (last 90 days)
Report Type
Count
Activity Summary 0
Claim Acknowledgment 0
Remittance Advice 0
report total: 0

XVII. Reports (con't.)

d). Download EDI Reports (con't.)

- Search
  - Enter a search string that is contained in the Filename or Date timestamp in the "Optional Search Criteria" text box. Ex: Enter 2005/12/16 to find all reports that have a creation date of December 16th, 2005.
  - Click Go. Click Reset to clear the search text box and display all reports available.



- Download a Report
  - The reports are in PDF format. In order to view the report, Adobe Reader must be installed.
  - If you experience errors attempting to open one of the reports on this page, please visit get the latest Adobe Acrobat reader from www.Adobe.com. Click the Get Adobe Reader button to download the latest version of Adobe Reader on your operating system.
  - Click on the Filename or the Date of the report.
  - Follow the browser's instructions to either Open or Save the report.